INDIANA WORKFORCE DEVELOPMENT AND ITS WorkOne CENTERS

Academic and Career Counseling

2011

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Academic and Career Counseling: Principles and Theories

INTRODUCTION

Traditionally, Academic Advisors and Career Counselors have functioned separately from one another, crossing over into the other's domain briefly and only when needed. Academic advising historically focuses only on the academic journey of a student. Usually, the end goal of academic advising is the completion of the specific training. Career Counseling tends to focus exclusively on assisting individuals with career choices. The need for an integrated model that combines both Academic Advising and Career Counseling is important as educational requirements for employment increase and more adults seek post-secondary education to enhance their marketability in today's tough labor market.

The concept of an *Academic and Career Counselor (ACC)* is a fairly new development in the process of how individuals explore and make important educational and career decisions that will impact their lives. Although fundamental counseling skills still apply, currently there is no single theory that exists to fully embody the integration of both academic advising and career counseling at the level required by WorkOne ACCs. It is therefore necessary to combine existing theoretical concepts from each field to develop an integrated approach to meet WorkOne customers' needs. ACCs must build on prior knowledge and experience in order to extend their skills to assist WorkOne customers in making informed decisions about career goals and academic pursuits. Each field of study, Academic Advising and Career Counseling, imparts relevant theories, foundations of thought, principles and competencies that set a framework for a new integrated model of Academic and Career Counseling. A strong knowledge base of both Career Counseling and Academic Advising theories is essential for ACCs to effectively guide the customers in making more satisfying life, career and educational choices.

COUNSELING APPROACHES

"The beginning of wisdom is the definition of terms." – Socrates

Clarification of terminology is important to develop a common language that will be used to explain and discuss the information learned with other professionals in the field. Additionally, understanding the slight variations in types of counseling will provide ACCs with the opportunity to develop a comprehensive foundation of thought, leading to a more holistic approach to counseling in workforce development that addresses both career and educational needs.

Academic Advising: "Academic advising is a collaborative relationship between a student and an academic advisor. The intent of this collaboration is to assist the student in the development of meaningful educational goals that are consistent with personal interests, values and abilities." (http://www.nacada.ksu.edu/clearinghouse/Research_Related/definitions.htm)

Career Counseling: A Career Counselor is a certified professional who assists people with career and life issues. Career Counselors work with clients to teach them strategies on how to successfully find new or different employment. Career Counselors help clients develop strategies and skills in exploring career options, identifying jobs, applying for jobs, networking, interviewing, developing resumes and cover letters, and creating a balance between work and personal life. (Brown, 2007)

Counseling: Counseling is a mutual relationship between a counselor (a professionally trained helper) and a client (consumer of counseling services).Traditionally, counselors are professionals that actively listen to an individual's story and communicate understanding, respect and empathy. They may assist in clarifying goals and assisting individuals with the decision-making process. (Handbook on Career Counseling, 1998)

Prescriptive Advising: This approach is concerned with conveying and interpreting information about rules, requirements and policies. This authoritative approach is one in which the counselor/advisor and student/customer have less of a collaborative partnership. The focus is on the transfer of information from the counselor to the student.

Developmental Counseling: **"**Developmental counseling or advising is concerned not only with a specific personal or vocational decision, but also with facilitating the student's rational processes, environmental and interpersonal interactions, behavior awareness, problem-solving, decision-making, and evaluation skills." (Crookstone, 1972)

Although fundamental counseling skills such as active listening, effective communication and adhering to professional boundaries apply, academic and career counseling is not meant to be therapy. Instead, it is counseling with specific educational and career oriented goals in mind. The focus should always remain on preparing customers for entry into a career.

REFLECTION

Why do you think it is important to understand definitions to effectively combine academic advising and career counseling? How can developing a common language enhance the services provided to WorkOne customers?

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KEY CONCEPTS

There are several key concepts to keep in mind while providing academic and career counseling to WorkOne customers.

- **CAREER MINDED GOALS**
  The ultimate end goal should always be a career. Customers should be encouraged to make informed decisions and develop goals to achieve a career. Any educational or training pursuit should be considered an action step toward progressing in the chosen career pathway.

- **RIGHT FIT/ RIGHT PLACEMENT**
  Academic and Career Counselors must ensure that customers are placed in the right training provider and program to fit their individual needs and goals. The training must be a "right" fit and address customers' values, strengths and experiences in order for them to be successful. All education steps should be taken with the ultimate goal of a career pathway in mind.

- **INCREASED EDUCATIONAL ATTAINMENT**
  Obtaining a GED is often not enough to qualify for many employment opportunities in today's labor market. All academic and career counseling sessions should be focused on coaching a customer to pursue higher skills credentials while pursuing a GED simultaneously if necessary. This can be achieved through the GED+ program. For more details, please see the Training section of this manual.

- **PROVIDING INDIVIDUALIZED SERVICES**
  Every customer is unique and it is crucial for ACCs to customize their approach when working with customers. The concept that every customer is like a snowflake should guide Academic and Career Counselors to provide individualized services and customize their approach to address customers' individual needs and interests. Career pathways should be developed for customers according to their values, aptitudes, motivations, strengths, skills and life circumstances.

GUIDING PRINCIPLES & CORE COMPETENCIES

Academic and Career Counselors will be more successful when guided by some core philosophical beliefs that will enable ACCs to ensure customers are receiving the type of integrated approach most appropriate for WorkOne Customers.

Some of the guiding principles include:

- Choosing and maintaining a career is a lifelong process for individuals.
- Education and training is only one decision point in a long series of career choices and transitions.
- The career decision-making process incorporates self exploration and knowledge, information about educational opportunities, and facts about the world of work. Integrating these areas of information in an organized way can help customers identify realistic academic and occupational self concepts.
- Career decisions are value-based. Supporting customers to clarify their beliefs and values, then coaching them to act upon these, is a critical step toward entering a satisfying career.
- There are no right or wrong decisions, only satisfying and unsatisfying ones. Future events may affect a decision in ways unforeseen at the time it was made.
- Effective career decision-making skills are used over a lifetime and can be learned.
- Sex, race or age should never be a barrier to exploring any and all possible career options.

REFLECTION

Are there any additional principles that you feel would be helpful in providing holistic and integrated academic and career counseling services? What are they and why do you feel these are important?

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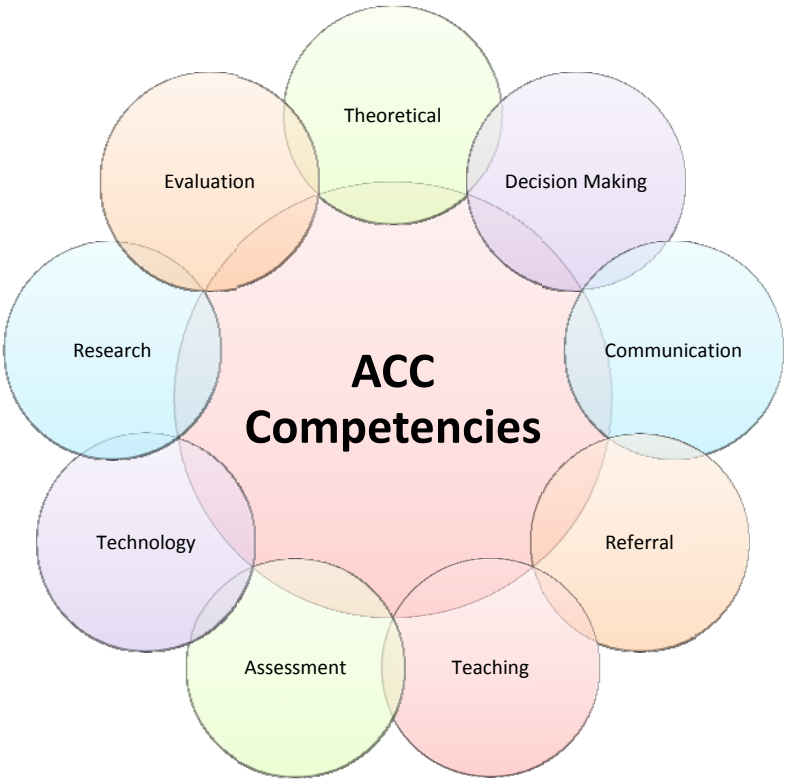
Academic and Career Counseling Core Competencies

In addition to these underlying principles, there are core competencies that are necessary for excellent performance in the field of academic and career counseling. These competencies should serve as a basis for personal goal setting and self-evaluation for Academic and Career Counselors.



1. **Theoretical Competency:** An ACC should be able to explain and discuss practical applications of theories relevant to academic and career counseling. ACCs should also be able to effectively use the following theories to create customized approaches to individual customers.
    a. Career Development Theory
    b. Academic Counseling Theory
    c. Life-Span Theory
    d. Values-Based Approaches
    e. Person-Environment Theory

2. **Decision Making Competency**: An ACC should be able to demonstrate an understanding of decision-making styles and how to coach customers' decision making in academic and career counseling. ACCs must be able to identify and overcome obstacles that prevent customers from making fully informed decisions.

3. **Communication Competency:** An ACC should be able to demonstrate the ability to use communication and counseling skills during counseling sessions including:
    a. Reflection Techniques
    b. Constructive Confrontation Techniques
    c. Active Listening
    d. Relationship Building

4. **Referral Competency**: An ACC should be able to demonstrate existing knowledge and the ability to access information when needed about academic providers and programs. ACCs should also demonstrate the ability to quickly and efficiently complete referrals.

5. **Teaching Competency**: An ACC should be able to use basic teaching techniques to coach customers on how to use technology, explore career options and find appropriate academic programs.

6. **Assessment Competency**: An ACC should have extensive knowledge of IDWD approved assessments including when to use, how to interpret, and the benefits and limitations of each assessment. Extensive knowledge of the following assessments is required:
    a. Test of Adult Basic Education (TABE)
    b. WorkKeys
    c. Indiana Career Explorer

7. **Technology Competency**: An ACC should be able to demonstrate the ability to effectively use technology to improve counseling sessions. This includes the use of Case Management Systems, INTraining, e-mail, assessment tools and other technology-based applications and resources that can streamline and enhance the counseling session.

8. **Research Competency**: An ACC should be able to research occupational information, training programs and providers, and industry related information to maintain awareness of new developments, trends and resources to provide better services to WorkOne customers.

9. **Evaluation Competency**: An ACC should be able to demonstrate a thorough understanding of the skills, theories and practical applications associated with Academic Advising and Career Counseling to develop a personal philosophy and create targeted goals that allow for self-evaluation of effectiveness.

Identifying competencies and combining them with theories fosters self-discovery and strong problem-solving skills, which are transferable to all aspects of the customer's experience. An effective Academic and Career Counselor understands theory and when to apply it to meet the needs of customers.

REFLECTION

Make a list of some tasks ACCs are responsible for at the WorkOne Center. After you create this list, identify what guiding principles and competencies are necessary to ensure that ACCs are successful and effectively working with customers.

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If an ACC lacked proficiency in even one of the nine competencies, how would the quality of services provided to customers be impacted?

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How would you address a skill gap in a specific competency area? What strategies or actions would you take to resolve the situation?

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The Competency Journal can assist you as an Academic and Career Counselor develop professionally and ensure you are effectively performing in this role. You can use this journal to record your current proficiency level in each competency area. By identifying your current skill level, you can effectively identify strengths and areas in which you are in need of improvement. Using this knowledge, you will be able to set professional goals and develop action steps to hone your skills. You can also use the Competency Journal for self-evaluation by tracking your progress toward achieving the identified goals, exploring resources that you may need in this process, and articulating ways to measure success for each area of competency. The Competency Journal can be found in the Appendix Section of this manual.

INVESTIGATING THEORIES

It is important that ACCs have a strong understanding of both academic advising and career counseling theories to be effective. By exploring and evaluating foundational theories that serve as the framework for an integrated approach to academic and career counseling, ACCs should be able to:

- Develop a deeper understanding of the relevance and practical application of theories in counseling sessions
- Develop an increased sense of confidence, awareness and ability to describe ways of thinking about the tasks and responsibilities of ACCs in the WorkOne Centers
- Combine practical application of the theories presented with personal counseling styles to meet the needs of each customer that enters a WorkOne Center

ACCs can use the valuable insight from both academic advising and career counseling theories to develop a holistic integrated model. Both fields offer an incredible amount of information and insight into critical aspects of counseling that is crucial for ACCs to understand and apply.

ACADEMIC ADVISING THEORIES

Typically, when one thinks of an Academic Advisor, they think of a faculty member at a specific institution that is responsible for coaching and guiding students' course selection. A growing number of institutions are bringing on full-time professional advisors from varying academic disciplines and backgrounds. According to Grites (1979), academic advising is "a function in which faculty and students consult about the student's selection of major and courses and proceeded through the scheduling process" (p.8). Academic advising theories focus on the educational or academic journey of students and often fail to address the steps needed after completion to enter employment or a career. Although the services offered by ACCs are more intense, the classic O'Banion Model (1972) of academic advising provides a solid starting point for ACCs to understand the academic advising process.

The O'Banion Model

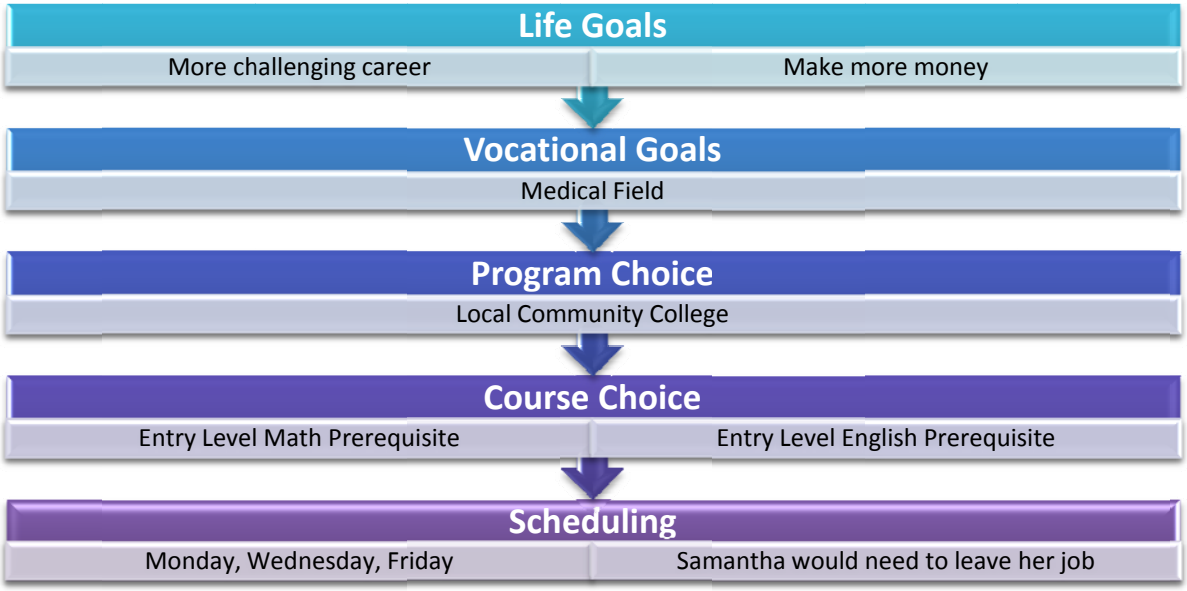
Terry O'Banion believed that the academic advising process should help students develop their full potential. His influential model describes five dimensions of the academic advising process:

According to O'Banion, the exploration of life and vocational goals as they relate to educational pursuits are the first steps before an individual can move to select a major and coursework. O'Banion viewed this as a strictly linear process where an individual progressed through each dimension of the advising processes sequentially.

It will be helpful to explore a practical example of how a counseling session framed by the O'Banion model might look.

EXAMPLE

Samantha is a student meeting with an Academic Advisor.



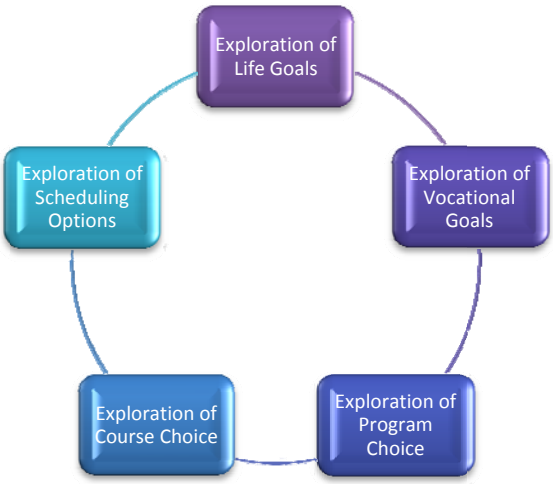
Unfortunately, the Academic Advisor informs Samantha that the courses that she needs are only offered during the times she must be at work. Samantha is then faced with decisions. She could leave her job, but would then need to find another source of income to support herself. She could look to other institutions or classes, but may face the same scheduling dilemma. This can be a very frustrating situation for Samantha.

The strictly sequential progress of O'Banion's model left Samantha stuck, having to re-evaluate program and course choices because the only times her desired courses were offered did not fit her scheduling needs. The O'Banion model of academic advising was developed with a "traditional" student in mind- an individual that has a flexible schedule and attends school on a full time basis. Traditional students are often younger and do not have many conflicting responsibilities such as family or work obligations. The O'Banion model did not allow the flexibility often needed for non-traditional students, who may return to school, attend school part-time, or have outside responsibilities. The strictly linear approach of the O'Banion model has been adapted to meet this concern and allow for more flexibility and adaptability in academic advising.

O'Banion Revised

Due to the drastic changes since 1972, it has been established that the O'Banion model, though valid, needs to be adapted to be more widely useful. The population of people pursuing post-secondary education has changed dramatically, and is much more heterogeneous in terms of gender, race and age than it was when the model was first developed. With this in mind, Burton and Wellington (1998) revised the O'Banion model to better suit the academic advising process for today's diverse population of students. The main premise of the O'Banion Revised theory is that every encounter between the student and the advisor involves the student exploring life and vocational goals. Advisors serve as facilitators of this process, encourage students to dig deeper, and coach the students in making decisions that are consistent with the student's understanding of life.

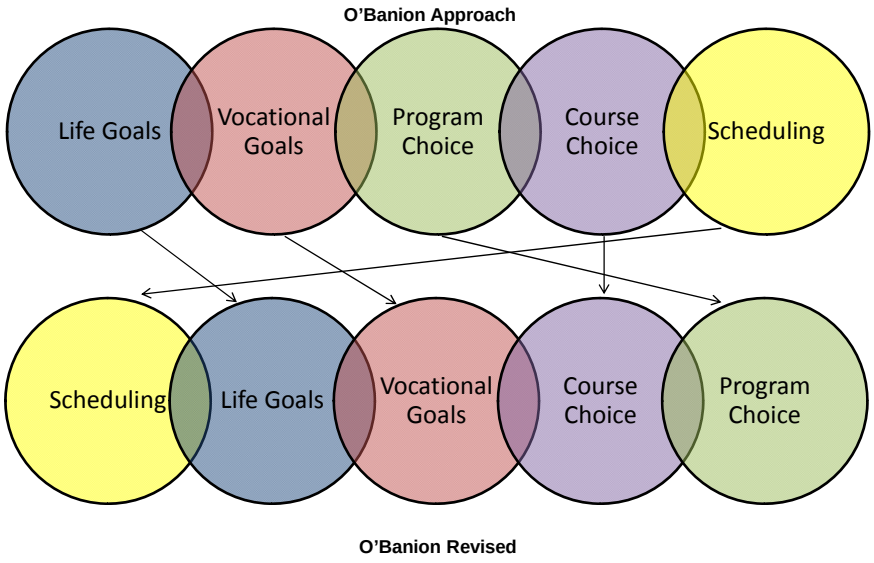
The O'Banion Revised model addresses all the dimensions, but allows flexibility to better meet the students' needs.



Though all of the steps of the O'Banion model are present, the Revised O'Banion allows the advisor flexibility to approach each of the dimensions non-sequentially. For example, a person might not have thought much about long-term life goals, but the individual knows that he or she wants to go to school at Ivy Tech because it is close to home and only a 5 minute commute. Though the ACC would obviously bring the customer through the process of setting some life and occupational goals, the need and desire of the customer to have education close to his/her home is a priority which should be explored. The O'Banion Revised model allows the ACC the opportunity to do that.

EXAMPLE- *O'Banion Revised model.*

Case Study: Samantha



According to the O'Banion Revised theory, Samantha's concerns regarding scheduling are addressed earlier in the advising process. The need for Samantha to take night classes would have a significant impact on the program she chooses to enter and the courses she takes. For example, after seeing that the Community College doesn't offer night classes, Samantha might look more closely at the courses offered at providers that do offer night classes. This might cause Samantha to change her vocational goal and pursue something else that will still help her achieve her life goals, but accommodate her scheduling requirements as well.

REFLECTION

What process do you currently follow for discussing training options with a customer? Where do you typically start the conversation? Describe your current academic advising process and your reasoning for using it.

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How has learning about the academic advising process changed your perception of the way you do this aspect of your job? After reading about the O'Banion and O'Banion Revised models, what changes would you make to the process you are currently using?

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The framework and dimensions that O'Banion and O'Banion Revised provided for academic advising can provide valuable insight into the process selecting training for WorkOne customers. It does, however, not fully explore some key issues. Often in academic advising theories, vocational and life goals are discussed only in reference to the student's academic or training pursuit because the focus is on ensuring the student completes the educational program. Academic advising theories often lack a strong connection to career development or career choice and require the student, after the completion of a degree or certificate, be referred to a Career Counselor for additional counseling.

The academic advising theories of O'Banion and O'Banion Revised address the academic focus of an ACC's job. But an ACC is not just an Academic Advisor. They must provide academic advising with a career focus. There is a need for ACCs to address tangible career pathways in addition to academic advising. Academic and Career Counselors should conduct all counseling sessions with the end goal of a career in mind. Therefore, it is essential for ACCs to explore career development and career counseling theories.

CAREER COUNSELING THEORIES

An essential part of an Academic and Career Counselor's job is to provide career guidance. Exploring and understanding career counseling and development theories is crucial since the end goal of WorkOne customers is employment. ACCs must be able to understand how to use various career development theories and effectively apply them to customers' personal career development and ultimate career choices. At WorkOne Centers, it is important that ACCs use career development theories to help customers select careers that reflect their goals, strengths, values, life circumstances and experiences. From these ultimate career goals, ACCs can guide the customers to obtain the training necessary. Two widely accepted career counseling theories that provide an excellent starting point to explore career development are the Trait and Factor Theory and Super's Life-Span Theory.

Trait and Factor Theory

The Trait and Factor Theory is the oldest and possibly the most widely used of all career development theories. It focuses on the match between individuals' aptitudes, achievements, interests, values and personality with the requirements and conditions of occupations. There are three steps to using the Trait and Factor Theory in career counseling.

1. Administering assessments, tests and inventories to measure aptitude, achievement and interest.
2. Obtaining occupational information
3. Making career decisions and developing a plan to reach the career goal

Step 1: Assessments

In the first step of the Trait and Factor Theory, assessments are administered and the Career Counselor is required to interpret the results. DWD has selected the TABE, WorkKeys, and Indiana Career Explorer as the primary assessments for use in Indiana due to their high reliability and validity. Each of these evaluation tools is dependable, consistent, and has been proven to measure the intended subject matter effectively. Upon receipt of a customer's assessment results, the counselor can make an initial determination about the customer's skills, knowledge, aptitude and interests.

With assessments, it is easy for a customer to make statements like, "The test told me I should be a…." It is important to not rely only on assessment results when counseling customers through career decisions. Relevant personal experience, feelings, values, life circumstances and strengths should also factor largely into customers' ultimate career choices. Most importantly, an ACC should remember not to judge the customer based on their assessment results, values or opinions. Counselors will encounter customers who have different values than their own. The job of counselors is not to judge or compare customers' assessment results with their own, but to provide appropriate information to help customers' self-exploration and allow them make the most informed decisions.

In addition to the formal assessments, a counselor will be doing ongoing informal assessments during counseling sessions through asking open-ended questions. This will allow the counselor to gain valuable insight into customers' personality, goals, motivation and strengths.

Once the counselor has this information, Step 2 of the Trait and Factor Theory can take place.

Step 2: Occupational Knowledge

Step 2 in the Trait and Factor Theory involves gathering occupational information. This includes obtaining information about any necessary education or training requirements for particular industries. ACCs should pay attention to occupational information AND academic information in order to apply this theory effectively while working with WorkOne customers, especially since the end goal for every customer is a career. Having extensive knowledge of regional economic development trends, in-demand employers and occupations, and basic knowledge of industries, occupations and wages is essential in being able to provide the customer with the accurate and thorough information needed to make career choices. Availability and practicality of education or training options for particular fields should also factor into helping the customers make these choices. All educational choices should be made with a career goal in mind.

Step 3: Career Decision

Once the first 2 steps have been completed, it is time for customers to process the information, and with the counselor's guidance, make decisions about how their skills, knowledge, and interests apply to the current labor market. Career decisions are made by combining and processing the information gathered from assessments with occupational knowledge and data.

Ultimately, ACCs want to support customers' efforts to make satisfying career decisions through a combination of self-understanding and occupational knowledge.

REFLECTION

What do you think are the advantages of using the Trait and Factor Theory with your customers? What are the disadvantages? How would you adapt this theory to fit your personal style of counseling?

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Life-Span Theory

Although the Trait and Factory Theory is the most commonly used career counseling theory, it lacks a significant component important to WorkOne Customers. That component is ***life circumstances***. In the 1970's, Donald Super, a theorist of career development, recognized the changes that people go through as they mature. Self-concept is an underlying factor in his model. Super's "Life-Span Theory" adds an important component to the "Trait and Factor Theory", to provide ACCs with a more comprehensive approach to counseling sessions.

Life-Span Theory, as it applies to career development, concerns the growing and changing ways that an individual deals with career issues over his or her entire life. If counselors incorporate the concepts from the Life Span Theory into the Trait and Factor Theory, a more comprehensive approach to career counseling can occur.

The key concepts of the Life-Span Theory are Life Stages and Work Values.

Life Stages

As people mature, they have many experiences and may peak and plateau through many occupational and career transitions. Some refer to these transitions as *life stages*. It is possible for an individual to experience a life stage at almost any time during his/her lifetime. It is also possible to be involved in several stages at once.

The following life stages apply to late adolescents and adults:

1. **Exploration**: Includes the efforts that individuals make to get a better idea of occupational information, choose career alternatives, decide on occupations, and start to work.
   Three sub-stages of exploration are:
   a. Clarification (clarifying what a person wants to do)
   b. Specifying (specifying preferences to find an employer)
   c. Implementation (making plans to fulfill career objectives)

2. **Establishment:** Includes the efforts a person makes when becoming established in one's work. In skilled positions, such as Nursing Assistant or Welders, this typically involves steady work for many years. In semiskilled and unskilled positions, such as general laborers or warehouse workers, a person may not remain in the same position but would work continuously in various jobs or organizations.
   Three sub-stages of establishment are:
   a. Stabilization (retaining employment in the established field)
   b. Consolidation (becoming comfortable with the work, secure, and valued for doing a good job)
   c. Advancing (moving into positions of more responsibility with higher pay)

3. **Maintenance:** This includes people who are not advancing, but are maintaining the same status in their work.
   Three sub-stages of maintenance are:
   a. Holding (taking any necessary actions that are needed to retain one's employment)
   b. Updating (updating knowledge and skills through continuing education or other means)
   c. Innovating (making progress in one's profession, contributing to the field, etc.)
   If a person fails to update his/her knowledge, or make some effort to innovate, he/she is in danger of losing his/her job. This will often be the case for customers seeking services through the WorkOne Centers.

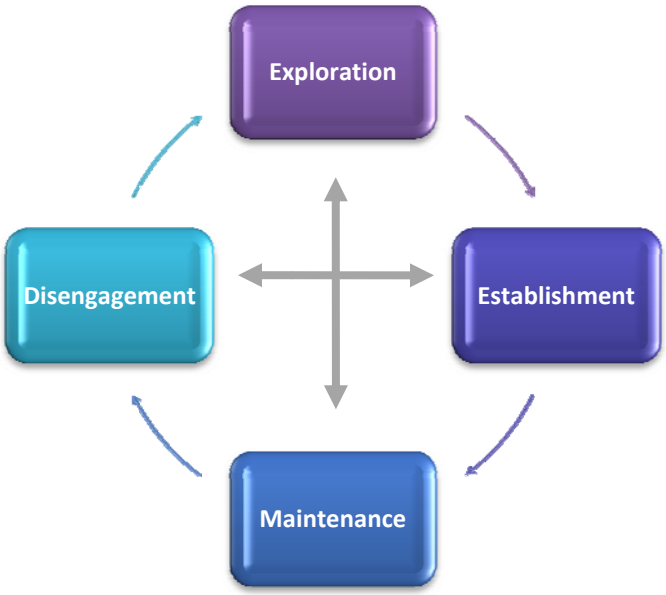
4. **Disengagement:** This refers to the point in a person's life where they are removing themselves from the workforce. This could be due to physical limitations and can occur sooner than expected in a traditional life-span, or can be due to a person's inability to "maintain" and thus be forced to disengage.

Three sub-stages of maintenance are:

a. Decelerating (slowing down one's work responsibility)
b. Retirement planning (can include changes in careers and part time jobs)
c. Retirement living (typically occurs when people experience changes in life roles. Other roles such as leisure, home and family, and community service may become more important while work becomes less important)

Note: Not everyone follows these stages in a neat, outlined order. In fact, most people do not. People often reassess their career plans at various points during their lifetimes and recycle through various stages. Many customers of the WorkOne Centers will be in the process of reassessing their career plans. There will be many older customers who may not have graduated high school, or went to work right out of high school. In general, Indiana has issues with very low educational attainment. Less than 25% of the current workforce in Indiana, including employed and unemployed workers, has a college degree (including 2 and 4 year degrees). These customers may be in both the disengagement and exploration life stages.

Although Super originally presented the stages and tasks in a sequential manner, he later added that we cycle and recycle through various life stages as we adapt to changes in ourselves, life circumstances, trends in the work place, and technological innovations. Understanding these ages and related stages of career development helps the ACCs select appropriate responses and activities.



It is important to note that although these stages could occur sequentially, they often do not. Frequently, a person is engaged in more than one stage a time. In an effort to avoid disengagement from the workforce, it is imperative to simultaneously engage in exploration, establishment and maintenance stages. If individuals fail to update their knowledge or make some effort to innovate, they will risk losing their jobs. This will often be the case for customers

seeking services through the WorkOne Centers. It is, therefore, important to encourage customers to continuously explore, establish and maintain concurrently via career exploration, goal setting, skill and educational upgrades, and creative problem solving to be proactive and improve their chances of avoiding workforce disengagement.

REFLECTION

Think of the types of customers that come into WorkOne Centers. Are the majority of your customers in one stage versus another? Why do you think that is?

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How would your counseling approaches vary for someone in the Exploration stage versus someone in the Establishment Stage? What types of things would you have to consider/do differently?

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What do you think the impact would be if an individual was not successfully engaged in continuously maintaining?

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Combining the concepts of the Life-Span Theory and Trait and Factor Theory can provide a more comprehensive approach to career counseling. However, this model does not place enough emphasis on the educational steps and decisions that WorkOne customers make.

SCENARIO

John comes into the WorkOne Center. He is a 52 year old machine operator in a manufacturing plant that just closed its doors. John has been job searching for several months and the only operator positions he could find are at least a 2 hour drive from his home. John knows he needs to look into work in other fields and identify his transferrable skills. He is nervous about finding new employment.

What Life Stage(s) do you think John is in? Why? What would you do to help him?

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What if John was able to find work locally, but needed to upgrade his skills to get the positions. Would his Life Stage(s) change? Why or why not? And if you think it will change, what stage(s) would you classify John as being in?

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How would this situation impact the service you provide John? Would you take a different approach if he was able to find work with a skill upgrade? What would that approach look like?

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Work Values

Super's Life-Span theory provides a framework for understanding how a career and career choice develops over a person's lifespan. It takes into consideration how a person grows personally, and how this influences career development. It explores how individuals go through various career stages established by internal and external forces, rather than tied to chronological age, and provides ACCs with the opportunity to identify and organize those factors to determine what influences their customers. One of the instruments that Super and his team developed to support their theory is the Work Values Inventory that Indiana Career Explorer uses to assess the values that are important to WorkOne customers.

Super's Work Values Inventory was developed to measure both intrinsic and extrinsic values related to the things that motivate people to make a particular career choice and stay in that field. Customers are affected by both their internal needs and the external means by which they satisfy those needs. For the customers seeking a first job or considering changing jobs, exploration of these values can be a meaningful starting point for counseling.

It is essential to assess and consider work values to be able to help customers make informed career decisions in which they are more likely to be satisfied. This is important to ensure that the customer is setting goals in which they will be motivated to take necessary action steps and follow through.

The Work Values Inventory measures both external and internal factors related to the work enviroment and job satisfaction. These include constructs such as altruism, creativity, intellectual stimulation, surroundings, and relationships with supervisors and coworkers.

Work Values include:

Achievement	Co-Workers	Creativity	Income	Independence	Life Style
Challange	Prestige	Security	Supervision	Variety	Workplace

Description of Work Values:

- **Achievement:** A job in which I know by my results when I've done a good job.
- **Co-Workers:** A job in which I work with people that I like.
- **Creativity:** A job in which I need to come up with new ways to do things.
- **Income**: A job in which I am paid enough to live really well.
- **Independence**: A job in which I can decide how my tasks get done.
- **Lifestyle:** A job in which I can lead the type of life I enjoy.
- **Challenge:** A job in which I can test the limits of my abilities.
- **Prestige:** A job in which I feel like my work is very important to society.
- **Security:** A job in which I will never get laid off.
- **Supervision:** A job in which I have a boss who recognizes my value.
- **Variety:** A job in which I do not do the same thing all the time.
- **Workplace:** A job in which I work in comfortable conditions.

Academic and Career Counselors will be able to access customers' Work Values Inventory results through the customer's profile in Indiana Career Explorer. More information on Indiana Career Explorer and Super's Work Values Inventory can be found in the Assessments section of this manual.

SCENARIO

Kathy is meeting with you to discuss a change in careers and possible pursuit of training in the field of Information Technology. Kathy has 15 years of experience as a retail sales associate, but has no desire to do that type of work anymore.

The values most important to Kathy are:

- Income
- Independence
- Variety

The values least important to Kathy are:

- Lifestyle
- Creativity
- Coworkers

Based on Kathy's Work Values, can you make any assumptions about Kathy's decision to change her career? Does her desired career path match her values inventory? Why or why not?

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What other occupational fields might you recommend Kathy explore based on what you know about her work values?

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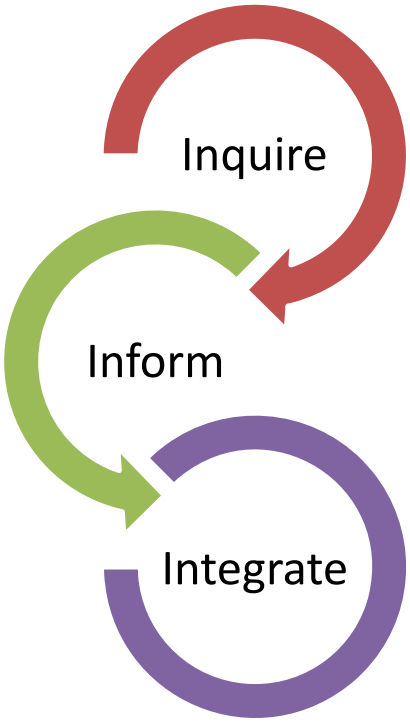
AN INTEGRATED APPROACH FOR ACADEMIC AND CAREER COUNSELORS: The 3-I Process

Because of the broad scope of services provided to customers, Academic and Career Counselors must integrate the theories of career counselors and career development with those of academic advising. It is necessary to draw from the multiple theories from both of the fields to effectively customize approaches to assist customers seeking assistance from WorkOne Centers.

The *3-I Process* is a model based on decision-making frameworks that allows ACCs to provide a comprehensive approach to academic and career counseling sessions. This also allows ACCs to integrate information from other established theories to provide holistic services to customers seeking both academic advising and career counseling.

There are three major steps to the 3-I process:



Inquire Determine customer values, goals and interests. Interpret assessments.
Inform Provide occupational and training provider/program information.
Integrate Make informed decisions combining all information from inquiry and information stages.

The 3-I process is a very accessible model for academic and career decision making.

The Inquiry Phase

This phase involves collecting information, as well as identifying and clarifying customers' academic and career goals, concerns, strengths, values and needs. Assessment administration and interpretation are also completed during the Inquiry Phase. Assessments can provide ACCs with valuable insight about customers' strengths, skills, interests and values. Communication and active listening skills are critical

during this phase. Customers will likely have a lot of questions and the ACC and customer will be working on building rapport and establishing a collaborative partnership throughout the Inquiry stage.

- ***ACADEMIC THEORY INTEGRATION*** includes the exploration of life and vocational goals, establishes customer priorities and explores all conflicts proactively.
- ***CAREER DEVELOPMENT THEORY INTEGRATION*** includes an exploration of customer assessment results, work values and life stages.

There are many career concerns that may be identified at this stage. These concerns require the ACC to provide guidance and support to the customer. These career concerns can often result in customers having a difficult time reaching career and educational decisions.

Possible customer career concerns may include:

- Information deficits:
  - Inability to relate occupational information to current academic focus
  - Lack of information about occupational fields in general
  - Not knowing what type of job they could get after pursuing a particular field of study
  - Not knowing how or where to access career information
  - Being unable to choose between two strong training options
- General indecision:
  - Developmentally not ready to make long-term decisions
  - Needing to assess their own strengths and limitations as they relate to careers
  - Changing training plans because they no longer have an interest in employment in that field of study
  - Inability to set career goals
- Personal concerns:
  - Lack of a vocational self-concept (inability to picture themselves in a specific career)
  - Lack of confidence in making decisions
  - Lack of motivation to explore career alternatives
  - Being bogged down with occupational stereotypes
  - Family pressures to choose unwanted career direction

Remember to use effective communication skills!

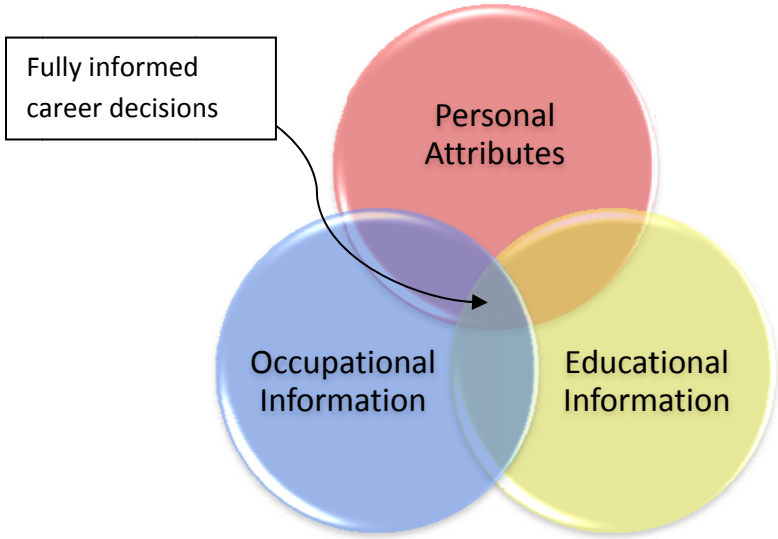
- Concentrate on what the customer is saying and focus on nonverbal cues/messages
- Eliminate distractions
- Listen for key points
    - Use reflection techniques to clarify
- Respond to the customer with interest and empathy
- Listen and respond to emotions that are being presented (feeling reflections)
- Work with the customer to determine actions he/she might take
    - Suggest actions if customer struggles with coming up with them on his/her own

*For more information about Effective Communication, please refer to the Counseling Skills section of this manual

Three areas where customers need to gather information are:

- Their personal attributes (likes/dislikes, strongest abilities, values)
- Educational information
- Occupational/career information

During the Information Phase, ACCs assist customers with finding reliable sources of career and occupational information that are appropriate to their goals and interests. Customers expect the ACCs to be experts in educational and career information. However, this expert information is only valuable in the context of the customer's attributes. The customer and the ACC must work cooperatively to uncover the personal attributes that, combined with educational and occupational information, will guide the counseling session and the development of appropriate life and career goals.



- ***ACADEMIC THEORY INTEGRATION*** includes sharing educational program information including scheduling and course options.
- ***CAREER DEVELOPMENT THEORY INTEGRATION*** includes providing pertinent occupational information.

More coherent, informed and realistic decisions are likely to be made when the above pieces of information are integrated.

The Integration Phase

Once ACCs and customers have completed the Inquiry and Information Phases, it is now time to start the Integration Phase where decisions will be made, goals set and action plans developed.

The ACC and customer make meaningful connections between the information they have collected and determine what additional assistance is needed to help the customer organize and develop a concrete career-oriented goal and action steps. Customers may need help from the ACC to integrate the following ideas:

- Self-information with academic information
- Academic program information with occupational information
- Self-information with occupational information
- All of the information they have collected together

It is important for the ACC to use the empowering approach throughout this process. Customers must feel that they are the decision-maker in order to feel fully vested in the goals that have been set.

Applying the 3-I Process

Mike is a 32 year old package handler who lost his job a few months back. Mike has his HS Diploma and has come to the WorkOne for assistance with training and finding employment.

Using the Integrated Career and Academic Counseling approach, Mike's ACC begins the 3-I Process:

Inquire:

The ACC reviews Mike's assessments (WorkKeys and ICE reports.) During the initial academic and career advising session, the ACC discovers that Mike did enjoy his work in the Logistics Industry, but would like to do something that provides a better wage. The ACC uses open-ended, high-gain questions to uncover Mike's strengths and some areas of opportunity. They have multiple discussions about Mike's life goals and what he sees in his future. Mike expresses interest in attending post-secondary training and acquiring a job with a higher wage within the logistics industry. The ACC focuses on developing rapport and forming a collaborative partnership based on trust to help Mike explore all of his options while making career and academic decisions.

Inform:

During this phase, the ACC and Mike work together to research and make sense of some pertinent occupational information related to the field Mike wants a career in. They use online resources to access the latest data. By using the current regional occupational data obtained from Indiana Career Explorer and Hoosiers Top 50, the ACC and Mike realize that his best chance at a high wage in Logistics would be to become a CDL driver. Mike is excited about this and after some demonstrations from the ACC on how to use INTraining, he uses INTraining to select 5 providers from his area that he is interested in attending. Together, they take the occupational information, educational information, and some of the data they gathered about Mike's personal attributes, and get ready for the Integration Phase.

Integrate:

It is decision time. Mike and the ACC now need to discuss which training provider he will select. Together, they do a thorough comparison of the certificate/degree options, duration of training, cost of trainings, location of trainings, and scheduling differences. They realize that Mike's lack of reliable transportation will inhibit him from attending 2 of the 5 providers on the list. Another provider's costs exceed the amount of Mike's ITA and Mike is not willing to take on large amounts of financial debt to acquire his CDL. Mike finally makes a decision about which provider best fits his needs. The ACC asks him some follow-up questions to ensure Mike made a thoughtful decision that took all factors into consideration. The ACC raises a few points of concern and Mike works through these questions to make an ultimate decision about the first step on his journey to a career as a CDL driver and they begin the referral process.

REFLECTION:

What were the most effective strategies the ACC applied from the theories discussed?

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What are some additional strategies that you would apply while working with Mike?

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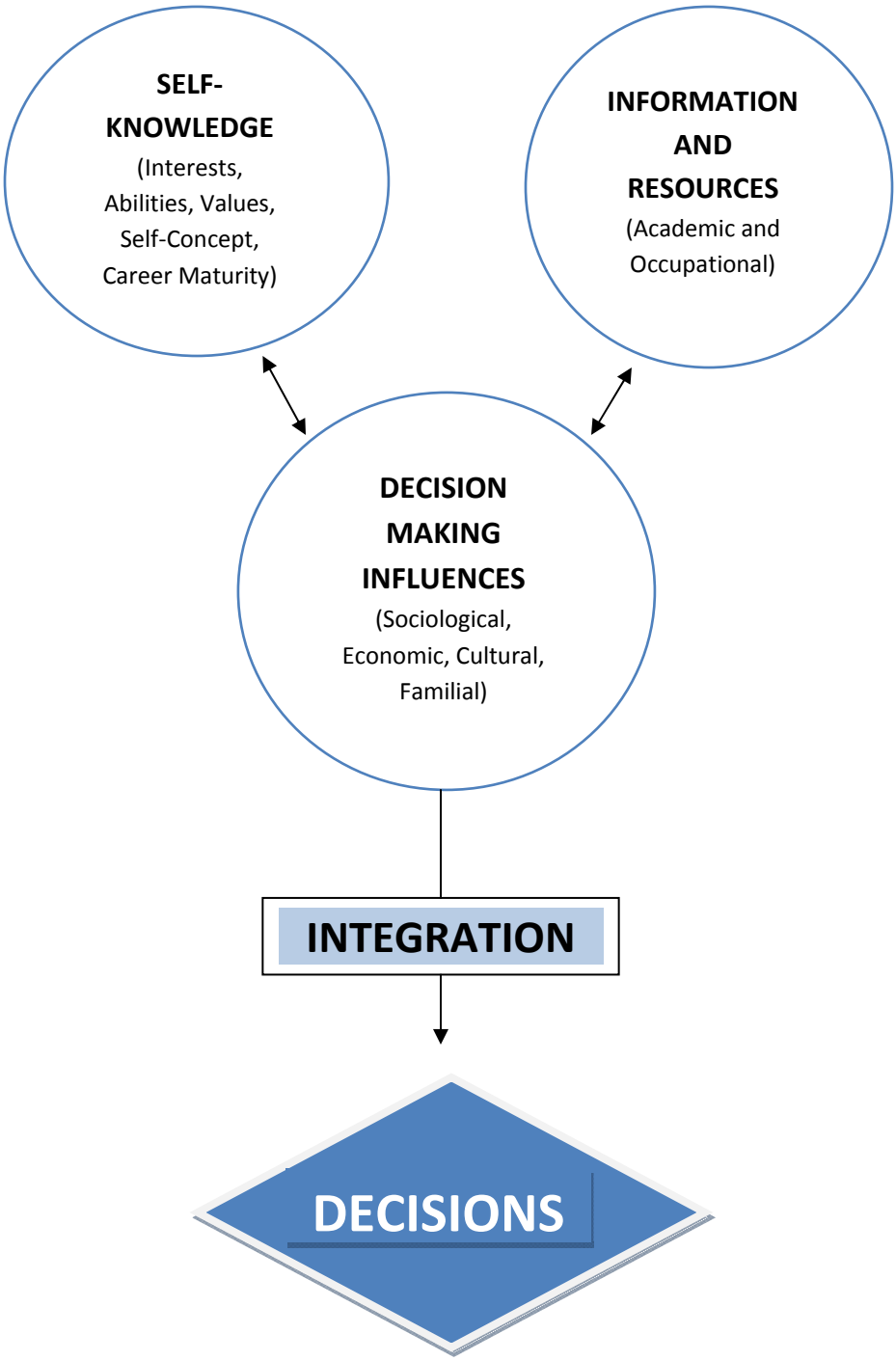
It is during the Integration phase that customers make important decisions concerning their career goals and the educational or training needed to successfully reach those goals. Understanding the decision making process is imperative for ACCs to be able to coach and guide the customers during academic and career sessions.

The following graphic summarizes how the 3-I Process leads to decision making:



REFLECTION

What do you think the most difficult part is for customers at the decision making phase?

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Why do you think it is so difficult?

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What can you do to help the customer make informed decisions during this phase? What do you think your role is at this point?

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A customer may experience difficulty making decisions for many reasons throughout this process. During the decision-making process, the ACC can ask open ended questions to assist customers with clarifying their positions and making the most informed decisions possible.

Some examples of questions that can be asked are:

- What information was used in making your decision?
- What if any information is still needed?
- What conclusions have you drawn from this information?
- What doubts do you still have?
- Are you still uncomfortable with anything?
- What do you like about your decision?
- What do you need to do next?

**For more information using open ended questions, please refer to the Counseling Skills section of this manual.*

An ACC can act as a stimulus for this activity by taking away the mystery of what questions to ask, how to gather the pertinent information, and how to make sense of what they have learned along the way.

SCENARIOS

Based on the following statements made by customers having difficulty reaching a decision, what would your response to the customer be? What are possible questions you, as an ACC, can ask to help the customer clarify his/her position?

EXAMPLE

Customer: *"I would love to attend training to be a veterinary technician but I am not even sure where to start or if I could be successful…."*

ACC Response: *Ask open-ended questions to spur information. Use an empowering approach to clarify the customer's position and what is causing the indecision.*

"What makes you consider this occupational field?"

"What further information do you need to decide if this training is something you can commit to?"

"Where do you think you can find out more about the qualifications needed, the job duties or specifics about what the training requires?"

Customer A: "I'm not sure what I am interested in, nothing stands out."

ACC Response:

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Customer B: "I have so many interests and I am having a hard time narrowing them down."

ACC Response:

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Customer C: "I know what training I'm interested in, but I don't know if I can actually find work in that field."

ACC Response:

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Making Connections

How ACC Core Competencies and the 3-I Process Correlate

By applying the knowledge of academic advising theories and career counseling theories, and using the framework provided by the 3-I Process, ACCs can make conscious decisions about the effectiveness of specific theoretical concepts in each counseling session to tailor their approaches with individual customers to create unique solutions. By possessing this knowledge, and learning how to apply it, an ACC can draw on pertinent theoretical concepts and information to best serve each customer. Thus, ACCs can avoid the pitfall of using a "cookie cutter approach" and treating every customer the same way. Each customer that enters a WorkOne office is unique, possessing his/her own set of values, beliefs, experience, skills, knowledge, abilities, goals, etc. What works best with one customer might not be what works best with another. Having a solid understanding of Academic and Career Counseling related theories provides an ACC with an arsenal of options to best meet the needs of each customer and help the customer ensure the right training fit to achieve his/her career goals.

DESIRED OUTCOMES OF THE ACADEMIC AND CAREER COUNSELING

Career and academic counseling should encourage customers to make coherent, informed, realistic decisions about their educational pursuits and career choices. In order to make these decisions, customers should take into consideration personal attributes, occupational information and educational information. Lack of reflection often leads customers to select inappropriate education or training programs. When customers opt for inappropriate trainings, they tend to perform poorly because they lack interest or motivation.

The academic and career counseling sessions should be aimed at selecting the right academic fit for the individual, thus eliminating a customer dropping out of the training or repeatedly changing programs or career interests.

Customers should acquire a mature understanding of themselves through the academic and career counseling process and any subsequent educational or training experiences. They should gain a deeper understanding of their own needs, motivations, capacities and goals. The process should aim to promote a customer's self acceptance while also challenging the customer to take steps toward positive change and long term career goals. An Academic and Career Counselor should ensure that time spent is productive and goal driven. Through collaborative partnership development, an ACC can assist customers in ensuring all educational and training decisions correspond with career goals.

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Counseling Skills

Competencies: Theoretical, Communication, Assessment, and Evaluation

INTRODUCTION

Academic and career counseling is a dynamic and interactive process in which customers are given the opportunity to fully explore occupations, develop a self awareness through various assessments, explore and select educational initiatives, and form appropriate career goals with the guidance of an Academic and Career Counselor(ACC). Counseling foundations and skills are the keys to implementing appropriate theories and creating a holistic and integrated model for ACCs.

The process of academic and career counseling sessions is rooted in foundational concepts and fundamental counseling skills that apply to all types of counseling. These tools are what Academic and Career Counselors need to properly implement applicable theories and form an integrated model to academic and career counseling. During this process the ACC serves as a facilitator of information, advisor, referral agent and coordinator of educational and training services. Together, the ACC and customer work to develop an action plan which will provide a clear career pathway and roadmap to success.

REFLECTION

ACCs are one spoke in a large wheel that is working to assist customers gain self-sufficiency through possible training and eventual employment. It is integral to work collaboratively with other partners in an effort to support customer success. How do you develop relationships with referral agencies, training programs and Business Service Representatives (BSR) throughout your daily activities? Why are these relationships important to delivering quality service to your customers?

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CAREER-FOCUSED ACADEMIC AND CAREER COUNSELING

Academic and Career Counselors (ACC) are expected to offer ongoing and multi-faceted services to customers who are interested in any training or educational opportunities. This includes customers in need of Adult Education, GED+, On-the-Job Training, or Occupational Skills Training. It is important that an ACC is not just conveying and interpreting programmatic information about rules, requirements and policies. Although this information is important, it is much more effective to shift the focus of counseling sessions towards customers' **career goals** and subsequent educational plans needed to reach those goals. Academic and career counseling sessions should provide guidance to customers in interpreting information and reviewing all existing opportunities.

Together, customers and ACCs should decide which opportunity is the best for the individual's current life circumstances and long term goals. The ACC must consistently encourage customers to keep their focus on their ***ultimate career goal***. All training options discussed with customers should be presented as action steps needed to reach the ultimate goal of their chosen occupational field.

COUNSELING FOUNDATIONS

The foundations of counseling provide a valuable framework that Academic and Career Counselors can use while implementing appropriate academic advising and career counseling theories. This enables the ACC to create holistic and integrated approaches customized to each individual customer's unique needs.

Counseling foundations include:

- **Understanding Our Customers**
- **Attribution Theory and the Fundamental Attribution Error**
- **Strength-Based Philosophy**
- **Customer Engagement and Developing Rapport**
- **Maintaining Professional Boundaries**

Understanding Our Customers

Individuals are likely to change careers more often in today's workforce than ever before. It is understood and expected in the current workforce that most people will have several career transitions over their life span. Career transitions often mean the need for additional education, certifications or qualifications.

Customers of the WorkOne Centers are often in very different situations, but each customer is facing the need to establish his/her career and for many customers this involves the need to obtain training in a new field to remain competitive in the job market.

There are many reasons that customers may be seeking education or training through the WorkOne Center. Many displaced workers may be seeking to increase their skill level or change careers due to elimination of their jobs because of plant closings, downsizing, farm foreclosures and business mergers. Older adults are increasingly looking for a second or post-retirement career and may need additional training to upgrade or learn new skills. There is an increasing number of veterans returning from serving overseas that must be reintegrated into the civilian workforce. Each customer has a unique circumstance and life experiences that must be taken into consideration when working with the customer and developing an effective career goal and action plan. The high volume of WorkOne customers may limit the amount of time ACCs are able to spend counseling each individual. ACCs will need to be efficient developing rapport and establishing collaborative partnerships.

Many employers are now seeking additional education credentials for entry-level positions. Beyond that, they are also seeking employees that not only have education or skills, but people that are able to work more efficiently and problem solve effectively. Employers are routinely asking their employees to take on more responsibility. Employees must keep up with the increased demands in order to remain competitive. This often means pursuing additional career certifications and Adult Education

concurrently through the GED+ program. (For more detailed information about the GED+ program and training options available to WorkOne Customers, see the Training section of this manual)

WorkOne customers should be encouraged to respond to this demand, increase their level of education and earn credentials that allow them to stay competitive in the job market. Throughout this process, customers, no matter what their individual circumstances are, need guidance, support, and education that ACCs provide.

Many different types of people with many different needs look to WorkOne centers for assistance and guidance. Being able to understand your customers is an important skill that you, as a successful ACC, need to develop. What are some techniques that you currently use to uncover individual customer characteristics and personalities? How is this information useful when developing career and education goals and action plans?

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Characteristics of Adult Learners

It is important that, in addition to exploring customers' individual experiences, an ACC understands some characteristics about adult learners to more effectively provide customized services.

- ***All adults have a wide variety of experiences both professionally and educationally that impact why they are interested in pursuing training and education.*** These experiences also dictate how they approach education and what educational opportunities will most benefit them.

- ***Adult learners' knowledge and experience in diverse areas provide valuable resources for learning.*** It is important to connect customers' life experiences and knowledge with learning and opportunities for training. Adults are readily able to relate new facts to their previous experiences and need to have their existing talents both acknowledged and explored. ACCs working with adult customers ensure that the educational opportunities correspond both with these experiences and with the long term goals developed in the Academic and Career Plan (ACP). Academic and Career Counselors explore customers' existing strengths and previous successes fully to provide a foundation for investigating educational and training opportunities.

- ***Customers may prefer experience and analogy-based training and learning. Adults also tend to favor practical learning activities that enable them to draw on prior skills and relevant***

knowledge. This is an important characteristic to take into consideration and discuss with customers when deciding on the best training or educational opportunity and developing long term career plans.

- ***Adults will benefit from an enhanced understanding of the importance of training or educational experiences.*** Education is best accomplished when it is goal-oriented. It is important to keep the goal of a career in sharp focus when offering career and academic counseling to customers.

- ***Adults tend to be most engaged while learning subjects that have immediate relevance to their work and personal lives.*** It is imperative that Academic and Career Counselors clearly explain how the training will directly impact customers' lives. ACCs should aim to help customers understand both the reason for learning and where they are in the process. Conversely, adults are less tolerant of work and educational initiatives that do not have immediate and direct application to their lives and objectives.

- ***Adults tend to learn best when they are ready to learn and have identified their own needs.*** The ACC must work with customers to ensure that they understand the relevancy and practical career path of a specific training program. It is also imperative that obstacles are addressed and eliminated before negatively impacting a customer's educational experience. This includes internal (lack of confidence) and external (childcare) barriers.

SCENARIO

Charlie Marks is a 38-year-old married man with two children. Charlie has worked at the same aluminum plant for 22 years but has recently been laid off due to plant closure. Charlie has a high school diploma but no further certifications or trainings. All of the knowledge and experience that Charlie has in the aluminum manufacturing industry was gained through his time at the plant. He has expressed an interest in pursuing a floor manager position at a similar plant.

Given the information you know about relevant theories and characteristics of adult learners, what strategies would you employ to develop an educational and career plan with Charlie? What other factors are important to consider in academic and career counseling sessions?

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How would you suggest further training to Charlie? What types of trainings or educational opportunities would someone in Charlie's position benefit most from? What are some other professional opportunities that you may suggest Charlie look into?

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Adult learners must be actively involved in the learning process and determining how and what they are learning. Customers should be presented with options and information. However, it is important that customers are ultimately responsible for the decisions concerning their education. It is imperative that a customer is the active partner in planning their career path and the subsequent education and training. When customers play an active role and assume the responsibility of the decision-maker they take ownership of their educational choices and feel more intrinsically motivated to ensure the venture is successful.

Adult learners may have valuable insight into what options are likely to work best for them based on prior experiences and successes. Also, adult customers are likely to have established values, opinions and beliefs. These must be completely explored and taken into consideration with possible training and educational options. Adults are more successful when they see the practical application of any training. When working with adults, it is important to focus on knowledge and self discovery rather than simply supplying an adult learner with facts. ***ACCs should be diligent in exploring a customer's perspective during career and academic counseling sessions.***

SCENARIO

Cynthia Roads is a 42-year-old single mother of 2 teenaged children. Cynthia has worked in education as a teacher's assistant for 18 years but, due to budget cuts, has been laid off from her position. Cynthia comes to your office visibly frustrated and upset. Cynthia explains that she knows all the keys to being a great teacher and has lots of hands on experience. Cynthia wants to remain in education but is reluctant to go to school for early childhood development certification because she feels new teachers are being trained in theories she doesn't agree with.

How would you address Cynthia's perspective concerning new teacher training in a sensitive way?

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How would you effectively implement academic advising and career development theories while working with Cynthia? What occupational information can you share with Cynthia to help her make a decision and develop career goals? Given the information about adult learners, how would you share this information with Cynthia?

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Common Challenges Faced by Adult Learners

Adults have many responsibilities to juggle which makes the decision to pursue education life changing. Adults pursuing training face unique challenges and barriers that an Academic and Career Counselor must be prepared to assist customers to address and overcome.

- ***Logistical Concerns-***Adults have many logistical considerations when choosing a training that is right for them. They may have family obligations to consider, which may include childcare and elder care.
    - ***Financial Concerns-***Many adults may have to work in order to support themselves or their families which may compete for the valuable time and energy needed for learning. The education program itself may be a large financial burden.
    - ***Social Commitments-***Adults considering training may have social commitments and scheduling concerns.
    - ***Tangible resources***-Resources such as transportation may become an issue. Often customers will be required to rearrange many aspects of their lives.

An Academic and Career Counselor (ACC) must be prepared to support customers making these decisions and balancing the often conflicting roles and responsibilities. An ACC should work with a customer to facilitate careful planning and goal setting that takes into account all of the demands of the customer.

- ***Personal Issues-***Customers may also be facing a multitude of personal issues that may interfere with them pursuing or remaining in a training or educational opportunity.
    - ***Self Esteem-***Lack of self esteem can be a hindrance to many adult learners.
    - ***Negative Experiences-***Adults may have concerns about reentering education because of previous negative or unsuccessful experiences. They may feel ill-prepared or discouraged by educational settings because of these previous experiences.
    - ***Concerns about Age-***There may also be a worry for customers that they are too old to be successful or that they do not have enough time to learn a whole new skill. Customers may be nervous that they will be the oldest person in the class or program which may cause some anxiety.
    - ***Anxiety-***Customers may also be anxious and feel overwhelmed by the bureaucratic and administrative steps required for the application process, enrollment in training, and completing the needed steps to secure funding.

Academic and Career Counselors should be prepared to assist customers to address all of these challenges which may often seem overwhelming. When working with a customer to overcome such challenges, an Academic and Career Counselor should encourage the customer to identify previous successes that they have had. Through discussing these successes, an ACC can help customers to define the strengths and resources that they have used in the past. Using these identified strengths and resources may be useful in meeting challenges the customers currently face.

Shifting the conversation from only focusing on challenges or obstacles to one that is solution-oriented and more focused on customer strengths can be extremely effective in building customers' problem solving abilities.

Customers that wish to enroll in training or an educational opportunity may require encouragement and assistance in dealing with possible barriers. ACCs have an arsenal of resources available for these situations and it is their responsibility to connect customers to the most relevant and useful resources for their situation.

SCENARIO

Allison Gus is 41-years-old and is interested in becoming a Certified Nurses' Assistant. While Allison has attended some classes through the local community college, they were immediately after completing high school and they were in computer technology (most of the information is now outdated). Allison has no professional experience in the medical field but has volunteered at her local hospital for the past 6 years. Allison has expressed anxiety over the length of time it will take to become a CNA and is overwhelmed by the applications and paperwork. She and her husband have 3 school-aged children and Allison is responsible for their after school care. She is concerned with finding and paying for after school childcare as well.

How would you, as Allison's ACC, provide academic and career counseling?

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How would you effectively integrate the 3- I Process (Inquire, Inform, Integrate) into your counseling sessions with Allison?

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Problem-solving abilities will be important skills customers can use in all aspects of their lives, including in employment settings. Customers may need the ACC to guide them in prioritizing and developing a plan to overcome challenges and be successful in training.

The first step in this process should always be to help customers identify their own pool of resources. This process serves to create a sense of empowerment and increased customer engagement. *By first requiring customers to access their own resources, they become an active partner and realize that they*

are capable of solving the issues that face them. Only after the customers' personal resources are fully explored should the ACC offer additional community and agency resources.

Creating a Motivational Environment for Adult Learners

It is important that Academic and Career Counselors understand customers' values and are able to effectively identify customers' motivations and use these to create an environment which increases the likelihood of success.

- ***Adults tend to be more intrinsically motivated and respond better to internal as opposed to external motivators.*** Often the best motivators an ACC can use are pointing out what the customers' self interests and benefits are when pursuing training and education. By focusing on customers' interests and how training is likely to benefit them directly, customers often have an increased effort to follow through with action steps and work toward meeting their established educational or occupational goals.

- ***It is also necessary to contextualize information concerning training opportunities during academic and career counseling sessions.*** An ACC may find it particularly helpful when working with customers to highlight the relevance of the training or education and how it will directly impact their lives. Customers entering an educational environment will likely be more motivated if they understand how the training is related to their own needs, interests or an expected outcome, including employment in a desired occupation, greater income, or more stability.

- ***If customers are going to be successful in training, they must take personal responsibility***. Adults entering education or training should be encouraged to take personal responsibility for their education. This is especially important to ensure that customers follow through with the chosen training. The ACC should strive to support customers in developing an attainable goal and ensure they have the necessary information to follow through with the action steps that were created in the academic and career counseling process.

- It is also necessary to ensure that any educational goals have a reasonable timeline for customers to effectively and efficiently complete the training and enter their chosen occupational field. ***ACCs should work closely to develop timelines with customers, understanding that time is of the essence for many adult learners.*** Customers often have competing demands for their time and limited resources. Throughout the entire process, the Academic and Career Counselor must remain available to assist customers in revising their goals and adjusting timelines as necessary.

- It is often effective when working with customers to focus on solution-oriented exploration and personalize the academic and career counseling approach whenever possible. ***Often, the best***

way to motivate customers is simply increasing reasons for enrolling into a training or educational opportunity and decreasing existing barriers.

- ***An ACC must anticipate and accommodate individual customers' differences***. Adults learn at different rates and in different ways according to their intellectual ability, educational level, personality and cognitive learning style. Working with customers to effectively create an environment that is motivational is essential in academic and career counseling.

REFLECTION

How can you effectively use the information about characteristics common amongst adult learners to better serve customers seeking academic and career counseling at the WorkOne Centers?

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What are 4 ways that you can successfully incorporate the information about WorkOne customers and adult learners into the theoretical framework established in the Theories Section to create effective academic and career counseling sessions?

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Attribution Theory and the Fundamental Attribution Error

It is important that Academic and Career Counselors do not make assumptions or rely on prejudice, stereotypes or first impression biases when working with customers. ACCs' own interests, values and abilities can often affect how they assess customer aspirations. ACCs are in a position to observe customers' behavior and address issues that are impeding career development, the setting of long term goals, the creation of action steps and accessing training opportunities.

Attribution theory gives a language to discuss and explain the causes of individuals' own and others' behavior.

In general, there are 3 ways that one can explain behavior:

Internal/ External

- **Internal-**Sandra just tripped over that cord. She must be a klutz!
- **External-** Wow, that cord is just laying in the middle of the floor. It is a hazard- no wonder why Sandra tripped on it.

Intentional/Unintentional

- **Intentional:** That guy just cut me off. He is such a jerk!
- **Unintentional:** Oh, that guy didn't see me in his blind spot. He should pay more attention but at least it wasn't on purpose.

Controllable/Uncontrallable

- **Controllable:** Ken failed that entrance exam because he did not study and prepare**.**
- **Uncontrollable:** Ken didn't fully comprehend the Calculus needed to pass the exam and therefore did not pass.

Fundamental Attribution Error (FAE) is the tendency to overestimate the extent to which a person's behavior is due to internal or dispositional factors and underestimate the role of situational factors. Ones' initial reaction is often to assume a person's behavior is due to an internal or dispositional trait. In other words- that the person's behavior reflects who they are as a person. FAE is especially harmful if Academic and Career Counselors rely on their first impression bias or assumptions when offering career or academic guidance. Relying too heavily on initial assumptions may influence the training or occupational opportunities and information offered to a customer.

EXAMPLE

Gregory Lacey is a customer in need of training to enter his chosen profession, but before he can enter the training, he must pursue remedial adult education classes to bring his reading scores up. Mr. Lacey is very confrontational and argumentative about attending adult education classes. He immediately shuts down when the classes are discussed and refuses to follow up on any appointments related to enrollment.

An ACC committing FAE makes the assumption that Gregory is arrogant and prideful. He does not appreciate my help and is obviously not interested in bettering himself because of his refusal to enroll in adult education classes.

The reality is Gregory has difficulty reading even the simplest text. He has been diagnosed with dyslexia when he was a child; however, his mother believed that he was "just not very smart" and therefore never followed through with extra support for his learning disability. Gregory has since developed a fear of classroom work in addition to his learning disability.

Everyone is likely to commit the Fundamental Attribution Error at some point. It is important for an Academic and Career Counselor to recognize and analyze initial attributions they are making when working with customers. As an ACC, one needs to take all possible causes of a person's behavior into account, including both seen and unseen situational factors. This becomes crucial because an ACC has a large responsibility in guiding and supporting customers' occupational and educational endeavors. ACCs should never rely on assumptions or first impressions when working with customers. They must take great care to investigate every situation fully.

An Academic and Career Counselor can take steps to overcome the Fundamental Attribution Error while working with customers. Using the debiasing techniques below can help to reduce the effects of FAE. It may be likely that an Academic and Career Counselor will still commit FAE upon first instinct but the techniques below will help ACCs maintain an awareness of such a bias and make appropriate adjustments.

Overcoming the Fundamental Attribution Error

- **Take heed of consensus information. If most people act the same way when put in the same situation, the situation is most likely the cause of the behavior.**
  Example- Luanne was fired from a position at a local supermarket after only 3 weeks on the job for "insubordinate behavior."
  Through open ended questioning, you discover that 6 other women were laid off from the same supermarket in the same window of time. Each woman experienced inappropriate language and conversations from the manager. After refusing the manager's advances, the women were fired.

- **Ask yourself how you would behave in the same situation**
  Example: Chelsea is extremely reluctant to enter any training or education programs and argues that they are pointless.
  Through open ended questioning, you discover that Chelsea was homeschooled and her family considered public education to be intrusive.

- **Look for unseen causes.**
  Example: Ronald has shown up to every 8 am workshop 15 minutes late. He always apologizes and enters the room quietly and quickly.
  Through talking to Ronald, you discover that he is responsible for getting his three children to day care in the morning and the day care does not accept students until 8 am.

- **Use <u>Two-Step Attribution</u> process. <u>Step one</u> is generally automatic; it is the initial attribution one makes. <u>Step two</u> involves self reflection. It is important as an ACC that you stop and think about possible external factors and reevaluate the original attribution making necessary adjustments.**

Each of the examples above illustrates how to use the Two-Step Attribution process to overcome FAE. With practice, patience, and the use of open ended questions, it will become natural to uncover the reasons behind customer behavior.

Academic and Career Counselors (ACCs) must be extremely conscious to avoid the mistake assuming customers are in their current situation solely due to internal or dispositional factors. Although it is unavoidable to commit FAE, it is particularly important to limit the *impact*. ACCs must support and encourage a wide variety of customers. It will be necessary during academic and career counseling that ACCs have appropriate tools to assess any possible biases and incorrect attributions.

It is important for ACCs to believe that customers are capable of success. By actively confronting initial attributions, ACCs can successfully overcome FAE and expand their attributions to include internal and external factors.

Fundamental Attribution Error occurs in all aspects of life, not just in academic and career counseling. Being aware of FAE and methods to overcome it will prevent snap judgments from overshadowing the reality of the situation.

REFLECTION

Consider a time when you made an immediate judgment concerning a customer's behavior. How would you approach this now knowing what you know about FAE?

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When discussing possible phlebotomy training programs with your customer, the customer is constantly fidgeting and staring out the window. The customer looks disinterested in what you are saying and is not replying right away to your questions. What are open ended questions you could ask this particular customer to uncover the reasons behind the behavior?

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A customer who wishes to enter CDL training must take remedial adult education classes to attain the minimum TABE score required for the training. The customer aggressively refuses and claims that he doesn't need the classes, just the training. How would you address this situation? What are some "unseen" reasons for this type of response?

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Strength-Based Philosophy

An Academic and Career Counselor should always work with a customer using a Strength-Based philosophy. It is important through the academic and career counseling sessions to encourage customers to explore existing strengths and how they can use these strengths to address any barriers and challenges they may be facing. All conversations and counseling sessions must be focused on creating unique solutions tailored to the individual customer's academic and career goals. ACCs should start the counseling process by identifying customer's existing strengths.

Customer strengths include:

- Experiences
- Talents
- Skills
- Interests
- Connections
- Support systems
- Dreams

By redirecting the focus from current customer barriers to how the use of existing strengths can resolve current challenges, ACCs are able to help empower customers and motivate them to identify action steps. Generating action steps by evaluating strengths used in previous successes helps the customer establish ownership over their actions and develop self-confidence that they can overcome them. These strength-based action steps not only serve to break customers' barriers into more manageable steps, but also identify specific tasks that need to be accomplished for individuals to reach their identified career goals. Assisting customers in discovering and articulating their existing strengths will foster motivation and allow them to see themselves as capable and competent. This is especially important when working with adults that are pursuing education and training.

The Strength-Based Philosophy is a set of ideas, assumptions and techniques that have emerged from the field of social work. Strength-based practice is built on the assumption that all people have strengths that may be unrecognized.

It is the Academic and Career Counselor's responsibility to assist customers to identify and effectively explore challenges using these strengths. Strength-Based practice is also rooted in the belief that individuals should be active participants in making important decisions that will dramatically affect their lives and future.

ACCs should aim to empower customers throughout the counseling process. Highlighting successes instead of focusing on customers' barriers can also be especially empowering. Through these discussions, customers see themselves as competent individuals and look beyond previous failures. It is through this that the customers can start to believe that they are capable of problem solving and making positive changes. Using the Strength-Based approach in academic and career counseling serves to foster customer hope and motivation by focusing on what has historically been successful for an individual.

Customers are capable of taking control of their life and making informed decisions about their future, including educational pursuits with the guidance of an Academic and Career Counselor.

It is never appropriate for an ACC to make decisions or solve problems FOR customers.

There must be a partnership developed between the ACC and customer in which the customer is the active partner and the ACC is in a supportive role. This effectively shifts responsibility to customers for owning and solving their own problems and being ultimately responsible for all decisions. The ACC is merely informing, advising and facilitating the problem solving and decision making process.

In this partnership, the ACC makes plans WITH customers and shares responsibility for arranging resources. It is imperative that the ACC and customers clearly define action steps, accountability, and responsibility throughout the counseling sessions. Ultimately, the ACC is there to guide customers and help them think through options and consequences to make informed decisions.

REFLECTION

A customer realizes that he must participate in a training program in order to be marketable. However, the customer seems to be relying on others to make decisions for him. The customer has recently asked you to "help" him find trainings in "something hands-on" around a very particular schedule. How would you initiate a conversation with this customer to encourage him to take more responsibility and ownership?

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A customer comes to you because she is interested in training. She tells you that she thinks she would like a job where she can "do what you do…help people and work in an office." The customer has a GED and one year of part time waitressing experience. She is 20 years old and is at the WorkOne center for help in deciding what to do next. What types of open ended questions would you ask to find out more about this customer's needs, goals, and skills? What strategies would you use?

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Although focus should always be on customers' strengths, there must be a realistic evaluation of the customers' skill levels and limitations. Limitations should never be ignored. Instead, the ACC should work with customers to create practical and attainable goals and develop an Academic and Career Plan (ACP) appropriate using the identified strengths, skills and resources. An ACC must work closely with customers to ensure that they are using all resources available to them, including personal resources. It is important that educational opportunities most in line with an individual's values, existing abilities and ultimate career goals are identified and pursued.

PRACTICE

A customer is facing childcare issues as she can no longer afford the day care she was sending her 3-year old-daughter to. The customer is very emotional about her perceived inability to provide for her child. Write 2 open ended questions to explore possible options for the customer. Then, write 3 possible avenues to investigate regarding childcare assistance using the Strength-Based approach.

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While discussing a customer's TABE scores, the customer admits to having difficulty reading. What are your next steps? What do you say immediately following the admission by the customer? How can you focus on the positives of the situation and empower the customer?

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Customer Engagement and Developing Rapport

Academic and Career Counselors (ACCs) must quickly and efficiently develop rapport with customers. This is imperative to developing a collaborative and productive partnership. Customers must be engaged throughout the entire career and academic counseling process.

Engagement is participation in cooperative, useful and reciprocal conversations that will open customers to positive change. Customers must feel that they are an active participant and capable of making informed decisions. There are several foundational attributes needed to ensure full customer engagement.

ATTRIBUTES OF ENGAGEMENT	
Trustworthiness	All coaching and advising should be rooted in factual information and not based on the Academic and Career Counselor's subjective opinion. It is necessary for ACCs to be honest about the tasks and responsibilities they are able to take on and time frames in which they are able to accomplish them.
Self- Awareness	Academic and Career Counselors should be consciously aware of any prejudices, personal beliefs or assumptions that they bring to the interaction with the customer. An effective ACC does not project personal beliefs onto the customer. ACCs can actively use debiasing techniques to overcome Fundamental Attribution Errors. Being self-aware will help an ACC promote professional boundaries and ensure that the relationship is productive.
Empathetic Understanding and Acceptance	An ACC must accept customers' perspectives as real and legitimate to them. There must be an effort made to understand the customer's perspective and values when making education and career plans.
Non-Judgmental	It is necessary that Academic and Career Counselors remain non-judgmental in language, non-verbal cues and actions.
Non-Threatening	Academic and Career Counselors should not overly stress negative consequences to gain compliance.
Instilling Hope and a Positive Mental Attitude	It is crucial that an Academic and Career Counselor remain positive and focus on customer strengths and resources. An ACC must successfully convey to the customer the belief that he or she has the capability to be successful.

An important factor in the academic and career counseling process is ensuring the ACC is showing concern for the customer as an individual. Customers are more likely to value any information and advice given to them when they recognize the staff's genuine interest and concern. In addition to Academic and Career Counselors being qualified to assist customers selecting the correct training program for their occupational interests, they must work to build a personal relationship and partnership with each customer. This partnership is the key to effective academic and career counseling. To be truly effective, an ACC must go beyond the routine information sharing and training referrals to help customers realize and achieve their educational and career goals. Understanding attributes of engagement is integral to delivering quality service to customers. These attributes can be expressed in both words and actions.

Consider the following examples below:

Trustworthiness: "I understand that you want to start your training as soon as possible but unfortunately, I will not be able to accomplish everything I need to on my end to make that happen before Wednesday. I wouldn't want to promise you something and not be able to meet that promise."

Self – Awareness: If you find yourself immediately judging a customer based on a physical, personal, or affected attribute, take moment to acknowledge your prejudice. Once you acknowledge its existence, you will be able to proceed with an open mind and with your customer's success as the ultimate goal.

Empathetic Understanding and Acceptance: "I can see where you are coming from. There are many different ways to approach every issue and I see that you view it this way. Your opinion and perspective matter immensely and we will work together to make sure your plan fits with your vision."

Non-Judgmental: Regardless of your personal feelings regarding a customer, it is vital to remain neutral during conversations. Flaming a fire is not wise, especially in your role as a counselor. Sometimes it is appropriate to "agree to disagree" on some points for the greater good of long term customer success.

Non-Threatening: While there are real consequences for many of our customers, it is an ACC's responsibility to concentrate on the positive decisions the customer is making while acknowledging the challenges they face. It is inappropriate to reprimand, accuse, or demoralize your customer in any way that could be perceived as threatening.

Instilling Hope and a Positive Attitude: Providing positive support for your customer is essential to your success as an ACC. For many customers, there will be many challenges and lifestyle changes that go along with a new career or educational opportunity. As the ACC you will be able to provide the positive reinforcement and momentum to encourage your customer to succeed.

In developing rapport, close attention should be paid to ensure ACC is demonstrating appropriate attending skills and effectively using non-verbal communication throughout counseling sessions. This is an effective technique that serves to reinforce customer engagement.

Attending skills that encourage customer engagement:

- Use good eye contact
- Face customer directly and lean forward slightly
- Adopt an open position and avoid crossing limbs
- Use facial expressions
- Reduce distractions

Some other simple methods of providing personalized services and increasing rapport are smiling and maintaining a tone that is friendly, courteous and professional. Although it seems simple, it is extremely important to refer to each customer by name. An Academic and Career Counselor must maintain an attitude of acceptance and respect throughout every interaction.

Developing rapport is essential. Only when customers feel comfortable, will they disclose barriers and cooperative problem solving can occur in developing a realistic plan to reach their goals.

Maintaining Professional Boundaries

The importance of establishing and respecting professional boundaries cannot be overestimated in academic and career counseling.

Professional boundaries are clearly established limits that allow an Academic and Career Counselor to make professional, ethical and safe connections with customers while developing professional collaborative partnerships.

To ensure the most appropriate and meaningful assistance is provided to customers, it is necessary to establish clear expectations as soon as possible with customers regarding the Academic and Career Counselor's role and expectations. ACCs must strive to create an understanding of limits and responsibilities of their role.

The relationship between customers and ACCs should be based on effectively supporting customers in reaching their goals. This relationship must not be construed friendship. An ACC should be friendly, but should not be "friends" with the customers that they are servicing. ACCs serve as a role model and should work to assist customers' development of ways to establish successful healthy relationships in a professional environment that will be necessary when they enter the workforce. It is necessary for Academic and Career Counselors establish trust and mutual respect with customers. This can only be achieved by strictly adhering to professional boundaries. ***Professional boundaries allow the Academic and Career Counselor to focus on their responsibilities to customers, offering appropriate services that will effectively move customers toward reaching their educational and occupational goals.***

Professional Boundaries:

- ACCs should ***restrict access to their own personal information*** when working with customers. It is not appropriate to distribute a personal cell phone number and an ACC should never contact customers using a personal telephone.
- It is important that ACCs ***restrict contact with customers to established meeting places***. This creates a space reserved explicitly for working on academic and employment issues for customers.
- ACCs must also maintain a ***professional appearance for this meeting space***. ACCs should be conscious to avoid displaying inappropriate or overly personal photographs or other materials where customers can access this information. It is important that this space is a professional working environment.
- An Academic and Career Counselor should strive to ***limit conversation to topics relevant to career goals and educational needs and goals*** to avoid any confusion about professional boundaries. It is also necessary for ACCs to redirect conversations in which a customer shares irrelevant or inappropriate conversation. This can provide a teachable moment for ACCs to discuss workplace norms and boundaries with customers which will be helpful to customers retaining employment.

- An ACC should be ***knowledgeable about appropriate resources*** to address issues that may arise and offer correct referral information.
- ***It may be helpful and needed for an ACC to frequently clarify their role and reiterate what are the professional boundaries.*** Customers may misinterpret information during a counseling session. It is particularly effective to ask a customer to repeat back what was discussed to ensure that there is a common understanding. This also gives customers time to ask questions if there is confusion, giving the ACC a chance to clarify and provide information.

REFLECTION:

Can you think of any additional points of clarification or strategies to ensure ACCs are adhering to professional boundaries?

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How can following the guidelines about professional boundaries strengthen relationships with customers?

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It is important that an ACC not over-share personal information. An ACC must pay special attention to limiting their use of personal stories while counseling. If an ACC engages in self-disclosure and chooses to share a personal story, they must be sure that it is not one that might blur professional boundaries. Too much self-disclosure on the part of the ACC can shift the focus from the customer to the counselor. If self-disclosure is overly or incorrectly used by an ACC, it may undermine the relationship and cause confusion for the customer as to roles and expectations of the relationship. Any personal information shared should be directly related to the customer's academic or occupational goals. Personal information shared should serve as "archetypes" and provided as jumping off points to help customers think about their own situation. An ACC should never assume customers' situations or goals are exactly their own.

REFLECTION

What are two situations in which it might be an appropriate and effective strategy to share a personal story? What information would you share in this situation?

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Confidentiality

Customers may disclose sensitive information during counseling sessions. It is crucial that Academic and Career Counselors to go to great lengths to protect the customer's right to privacy and confidentiality. All HIPPA regulations must be adhered to, including maintaining customer files in a secure location and ensuring only essential staff members have access to customer case notes. WorkOne staff should refrain from talking about customers' situations or sharing customer information in public areas in which the information can be overheard. A staff member should never bring customer information home. Customer information should only be shared with other agencies with the customer's permission and there should always be a signed information release shared between referral agencies. Information shared should be restricted to relevant information related to training or career development

The following activities are examples of behavior that would be inappropriate or breach professional boundaries:

- Dating or having a sexual relationship with a customer or former customer
- Lending money to a customer
- Discussing personal information with a customer in a non-work environment, such as a mall or grocery store
- Discussing a customer's case with another customer or gossiping with a customer
- Selling or purchasing items from customers such as catalog items or raffles
- Inviting a customer to a religious event or displaying religions information in work area
- Displaying inappropriate photographs or literature in a work area
- Becoming Facebook friends with a customer or contacting a customer via social media
- Giving or receiving gifts from customers
- Calling or texting a customer from a personal cell phone
- Giving a ride to a customer using a personal vehicle
- Developing a relationship outside after hours or outside of work
- Accepting gifts or bonuses from training providers in exchange for referring students

It is important that Academic and Career Counselors establish and maintain professional boundaries throughout developing rapport and establishing a productive collaborative partnership with customers. If an ACC feels that there are any issues or and breakdown of professional boundaries within the relationship, it is important to address these quickly. While discussing maintaining healthy boundaries with customers, it is necessary to be sensitive to a customer's feelings. An ACC should emphasize their commitment to providing the most appropriate services to the customer to ensure they are working effectively together towards the customer's goals. If an Academic and Career Counselor has an outside or previous relationship with a customer, supervisory or management staff should be informed immediately to ensure there is no conflict of interest.

COUNSELING SKILLS

Counseling skills are necessary to work with and fully engage the customer in the counseling process. They are also necessary to properly implement counseling theories. Counseling skills can be considered the tools used to implement theories.

Counseling skills promote effective communication and allow Academic and Career Counselors to share, obtain and relay information as well as motivate and problem solve. Using communication skills ensures mutual understanding which is essential in academic and career counseling. Communicating effectively is a necessary skill when engaging customers, conveying important information, building a collaborative partnership and establishing goals.

In the first meeting, ACCs must focus on getting to know the customer and discussing their role. Some customers are likely to talk freely and readily provide the information. If a customer appears shy or offers little information, an Academic and Career Counselor may need to use effective communication techniques in order to gather information and develop a rapport.

Counseling Skills include:

- **Active Listening**
    - **Questioning Skills**
    - **Reflections Statements- Mirroring, Paraphrasing, Feeling Reflections**
    - **Continuation Responses**
    - **Providing Expert Opinions**
- **Constructive Confrontation**
- **Administrative Tasks and Time Management**

Active Listening

While working with customers, an Academic and Career Counselor must employ active listening. ***Active listening is "creative listening", that is when the listener intentionally focuses on what the speaker is trying to convey.*** Active Listening is listening with one's whole person and giving total attention to what the speaker is saying. ACCs must be receptive and actively receive words, feelings and experiences

from customers during counseling sessions. ACCs seek to understand, interpret and evaluate the information being communicated. This is a key skill for Academic and Career Counselors in providing the necessary personalized attention and services to customers. An ACC must pay careful attention when customers are speaking and actively seek to understand customers' perspectives. This includes also observing customers non-verbal behavior, including tone of voice, posture, expressions and eye contact.

Effective communication techniques will enable the ACC to engage customers while actively listening. ACCs should also strive to clear their mind of distractions. It is also necessary to clear their workspace of anything that might serve to be a distraction during the counseling session.

Academic and Career Counselors should be aware of possible roadblocks that may interfere with establishing the collaborative partnership necessary for productive counseling sessions. It is important to avoid shutting down customers by arguing or interrupting. During sessions, it is extremely important that an ACC resist the urge to interrupt a customer and jump in with advice and solutions. The goal must be to facilitate the customer's self-exploration and goal-setting process. When working with a customer to uncover the customer's personal interests, strengths and skills, an ACC must be actively engaged in order to understand the customer. If distractions are present in the workspace during these sessions both the ACC and the customer could lose focus and miss out on valuable information.

***Active listening techniques include questioning, reflections, continuation responses and providing expert opinions*.** Through active listening, Academic and Career Counselors are able to engage customers, develop rapport and successfully build the productive collaborative partnerships necessary to ensure that customers are pursuing an educational opportunity or career in which they are likely to have long term success.

REFLECTION

What are 2 distractions that you are aware of in your workspace? Knowing what you know now about active listening, how do these distractions prevent you from actively listening? How can you change them?

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PRACTICE

Using language that can be interpreted as judgmental or critical is a sign of poor communication strategies. Consider the following poor statements. Re-write them in an appropriate manner.

"You shouldn't have had kids with that guy if you knew he was such a deadbeat. No wonder he isn't helping you out."

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"You are complaining a lot about pay, but honestly, you're too inexperienced to get a good paying job."

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"You must really not care about getting back to work because you've been unemployed for an entire year."

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Questioning Skills

The questions that are asked during an academic and career counseling session can be used to seek information as well as build a relationship. It is important that Academic and Career Counselors have a clear understanding and are adept at using questioning techniques while working with customers. Effective ACCs use both open and closed-ended questions to obtain needed information and allow for a customer to explore his or her situation, goals and barriers.

Closed-ended questions can usually be answered with a one word answer. They are generally used when gathering or clarifying specific information. These kinds of questions are often used to verify information. Closed-ended questions must be used carefully as they often inhibit communication.

Open-ended questions are helpful to clarify issues, identify problems and lead customer to self-exploration. They cannot be answered with a one word response. Open-ended questions serve to help establish customers' needs, feelings and opinions.

It is important that an ACC fully understand the customers' values to ensure that the academic guidance and career development is in line with the customers' values, strengths, experience and skills. An ACC must take every step to ensure that the customer is making an informed choice.

Using open-ended questions can guide counseling sessions to accomplish these goals.

Closed-Ended Questions	Open-Ended Questions
Do you have any hobbies?	What kinds of activities do you enjoy in your spare time? What are some of your hobbies? What kinds of extracurricular activities did you enjoy while attending school?
Do you like (machine operating/bank telling/retail)?	Is there a specific aspect of this occupation that particularly interests you?
Do you want to go to the accounting training program because you are good with numbers?	Can you tell me about why you decided to pursue education in this field? What led you to choose this field of study?
Do you plan to be still working in 5 years? Do you plan on having the same career in 5 years?	What are some of your long-term career goals? What do you see yourself doing 5 years from now?
Did you like math in school?	What were your favorite subjects in school?
Do you consider yourself organized?	What are some characteristics that best describe you?
Do you like the welding training program?	Can you tell me more about how training program is going?
Do you attend training?	What kinds of challenges have you been facing while attending the training?
How long did it take you to finish the certification exam?	What are some steps you would take in order to get extra help or tutoring if you needed it?
Do you do anything to relax?	How do you manage your free time? How do you balance all of your responsibilities?

During academic and career counseling sessions, customers receive intensive coaching to continually refine their understanding of their own life and vocational objectives. It is through this coaching and counseling that customers will be more inclined to choose careers, and by extension educational opportunities, that are consistent with this understanding.

Open-ended questions should be geared toward obtaining information concerning customers' life goals, vocational goals, scheduling concerns, and educational or training program and course preferences. It may be particularly effective to use assessment results as a foundation for asking high gain open-ended questions to encourage customers' self exploration. As Academic and Career Counselors are likely to have many competing demands for their time, it is essential that counseling sessions are guided and efficiently explore all issues. ACCs must be highly skilled at asking high-gain questions.

High-Gain Open-Ended Questions
Investigative questions- used to obtain facts and objective data EXAMPLES- "Tell me what you have done so far." "What steps have you taken to complete this as of now?" "Give me an idea of the type of work you have been doing."
Empowering Questions- Inquire into what the person is feeling, planning, wanting and ready to commit to. EXAMPLES- "What do you want to gain from this training?" "How do you see yourself completing this program?" "How do you think this will change your life?"
Discovery question -Push the person to draw conclusions, learn from experience and discover new knowledge or insights EXAMPLES- "What have you learned so far?" "What aspects of your life are different now?" "How has your perspective changed?"

Academic and Career Counselors use questioning techniques throughout a session but remain focused on the topics related to training and career development. ACCs must listen to customers' answers and connect their enthusiasm with educational and occupational choices. All sessions should maintain a focus of the customer's ultimate occupational goal and the steps needed for the customer to reach that goal. All discussion should be directed toward topics that are relevant to that goal.

Questions are useful to gain information, explore challenges and discover customer goals, support customers' self-reflection and facilitate the development of essential problem-solving skills. By carefully listening to responses, ACCs can effectively use questioning techniques to gain necessary information and develop attainable goals with customers, going beyond merely obtaining or providing information.

REFLECTION

Carefully paying attention to customer responses will allow the ACC to be able to develop pertinent and effective follow up questions. Consider the following responses and develop a follow-up question using the skills discussed above.

"Well, I want to do the pharmacy technician training, because I enjoy medicine and health a lot. Plus, I think I would be pretty good at it."

Follow-up Question:

_____

_____

_____

"I think I have gained more confidence in my intelligence. Before going through the adult education classes, I always felt like I wasn't smart and I didn't want to help my kids with homework. Now, I brushed up on my skills."

Follow-up Question:

_____

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"All my professional experience is in retail but honestly, I want to get into finance."

Follow-up Question:

_____

_____

_____

Employing open-ended questioning and other active listening techniques will foster an environment conducive to self exploration and allow the customer to make an informed decision. It is only through collaborative partnerships that effective goal setting take place.

Limit the Use of "Why?"

Academic and Career Counselors must take special care to limit the use of asking questions that begin with "why" when counseling customers. Questions beginning with "why" tend to elicit a defensive response and close lines of communication. Often these questions, despite the intention, are perceived as accusatory which serves to disengage customers and break down relationships. It is more effective to reword the question or develop another way to ask the question to obtain the information.

REFLECTION

Read the following "why" questions. Re-write the questions in an empowering, customer focused way without using the word "why."

"Why don't you have reliable childcare set up?"

_____

_____

_____

"Why do you only have your high school diploma?"

_____

_____

_____

"Why do you want to be a machine operator?"

_____

_____

_____

"Why are you looking for a new career?"

_____

_____

_____

Active Silence

When asking questions, an Academic and Career Counselor must allow the speaker to think about the information being asked and formulate as answer. An ACC must resist the urge to jump in or interrupt the customers with facts or information. It is more effective to wait for customers to finish their answers completely and allowing customers to fully complete their answer before responding. This may take a few seconds or a few minutes. Customers will gain more insight if they are given the opportunity to articulate their own answers. Allowing customers to think through their answers will encourage self evaluation and the development of problem solving skills.

An Academic and Career Counselor should be sure to ask appropriate follow-up questions so that customers can clarify their positions. It is important that ACCs do not rush to answer the questions themselves or supply suggestions without first giving customers' the opportunity to think through the issue or problems. It will be more beneficial to allow customers to explore their own thoughts and feelings and develop unique solutions relying on their own resource network. Although it may seem easier to offer blanket or scripted information, ACCs must refrain from this practice, opting instead to tailor their approach to the individual customer's strengths, skills, resources and goals.

Using Reflection Statements

Reflection statements are an excellent active listening technique for ACCs to use in counseling sessions to clarify what customers are saying.

Using these techniques, an ACC listens for the key points the customer is communicating. Reflections allow the ACC to focus on the cognitive or emotional content of customers' statement ensuring that the ACC has an accurate understanding of the customers' perspective. When a customer makes a statement, restating the content using reflection techniques directs the attention to the person, situation or general idea of the statement. Customers are then encouraged to add or develop the statement. These techniques can help an ACC clarify what customers are saying, strengthening the partnership being created with a customer. When customers feel that they are being heard, they tend to be more engaged and motivated in the academic and career counseling process. Reflection statements can also reflect voice, tone, gestures and facial expressions, which can be keys to inferring the emotional content of a customer statement.

Mirroring, Paraphrasing and Feeling Reflections are all useful reflection techniques.

Mirroring and Paraphrasing

Mirroring and Paraphrasing are reflection statements that focus on restating the factual and informational content of a customer's statement.

Mirroring is a technique that involves repeating exactly what the customer has said. Mirroring is meant to be a confirmation with no additional information using the customer's words allowing him or her to feel heard. This is almost like a verbal head nod and can be particularly useful if the ACC is having trouble discerning how the customer is feeling or how a specific situation may be affecting the customer.

<u>Mirroring Example:</u>

Customer: "I really just need to start working again. I feel overwhelmed with all of the bills and the stress. I get so stressed out sometimes that I just can't do anything."

ACC: "You really need to start working again. You feel overwhelmed with bills and stress. (Is this how you are feeling? What are some steps you have done to start looking for a job?")

Like Mirroring, Paraphrasing is a technique that focuses on the informational content of a customer's statement, but only the essence of the statement is reflected***.***

Paraphrasing allows only the essential content to be restated using the listener's own words. Paraphrasing statements often start with "it sounds as if." This technique is particularly useful when an

Academic and Career Counselor wants to clarify a specific point or ensure they fully understand the situation.

Paraphrasing Example:

Customer: "I just get so angry when people come barging in like they own the place and start ordering people around. I worked at that plant for 17 years, I know how it works! Not some idiot in a suit!"

ACC: "It sounds as if you know a lot about the work that you did at the plant and were offended when the management company introduced new methods."

Mirroring and Paraphrasing techniques reflect the informational or factual content of the customer's statement. These techniques restate only the content of what a customer is saying. It is important when using these techniques that the ACC is following up with questions, ensuring the actual content or perspective being communicated by the customer was fully understood. Follow-up questions allow the customer to clarify any miscommunication. Content reflections, like Mirroring or Paraphrasing, are most often used when little emotion is perceived.

Feeling Reflections

Often it is important for Academic and Career Counselors to understand customers' full experience beyond just factual information. In these cases, it is useful to also explore emotional content of a customer's statement.

Feeling Reflections contain just the essence of the factual information focusing on the emotional content of the customer's statement. In order to correctly infer a feeling or emotion, it will be necessary for an ACC to observe the customer's nonverbal cues and tone of voice.

Feeling Reflections often start with the statement "I get the impression you feel…" followed by the emotional content of the customer's statement. By using feeling reflection statements, an ACC can communicate that they understand the feelings, thoughts or behaviors from the customer's frame of reference.

Feeling Reflection Example:

Customer: "I have 3 kids, all less than 7 years old. My husband passed away 2 years ago, so I had to figure out a way to support everyone. I dropped out of school to get married, so no one wants to hire me. I mean why would they? I've got no diploma, no job experience, and 3 kids who always seem to need me!"

ACC: "I get the impression that you feel a little overwhelmed right now, is that right?"

It is critical that Academic and Career Counselors do not assume they know how a customer feels. ACCs can make an educated guess or imagine how they might feel if in the customer's situation but Feeling Reflections should always be followed up on to confirm the correct feeling or emotion was interpreted and there is a clear understanding of how the situation is actually affecting the customer. This allows customers to have a chance to confirm or clarify what they are actually feeling.

Reflection Statements are helpful active listening techniques to effectively develop rapport and ensure that an Academic and Career Counselors have an accurate perspective of a customer's situation. They are most effective when combined with follow-up open-ended questions allowing time for active silence during which a customer can process the question and provide answers.

CASE STUDY

Harry is a 20 year old out of school youth who came to the WorkOne Center because he is interested in training. Harry dropped out of high school in the 10th grade. He stated that his girlfriend recently gave birth to a child and he realized he needs to get a job. He stated that he has been trying to find employment but has not had any luck. Harry believes he cannot find a job because of his lack of experience and education.

ACC: What kinds of jobs have you been applying for?

Harry: I have mostly been putting in applications for fast food jobs. I'm willing to just about anything now but I haven't even gotten any calls back!

ACC: So you have been putting in applications for fast food jobs. You're willing to do anything but you haven't gotten any calls back***…<Mirroring>***What do you think would be a good next step? ***<Open-Ended Question>***

Harry: Uggh. It's just so much to think about.

ACC: It sounds like you're feeling overwhelmed when you think of everything that you need to do. Is that how your feeling?***<Feeling Reflection>***

Harry: Yeah I am overwhelmed and frustrated. I mean it's not my fault that I can't get a job. I am trying. It's just no one is willing to give me a chance. I know I'm young but I have responsibilities too. I need to be able to pay bills and support my family. I got a kid!

ACC: So, you are saying that you feel like no one is giving you a chance and you are feeling pressure because of your financial responsibilities? ***<Paraphrasing>***Where do you think you need to start to be more qualified for employment opportunities?***<Open-Ended Question>***

Harry: I think I definitely need to work on getting my GED. Then I was thinking of maybe getting my commercial driver's license.

ACC: Working on getting your GED seems like a good short term goal to be more qualified for employment. Training is also a good next step to explore. What about getting your CDL appeals to you?

**It is most effective when open-ended questions, Mirroring techniques and positive reinforcement are used together. Using these techniques an ACC can obtain needed customer information and steer the conversation to career and training related topics, uncover goal and develop action steps.*

Continuation Responses

Often it is necessary to encourage a customer to continue speaking or elaborate about a specific subject. Continuation Responses can help guide a conversation to obtain a more complete picture. An Academic and Career Counselor can use verbal and non-verbal Continuation Responses to invite customers to continue or request more information. These continuation techniques can be helpful active listening techniques and encourage customers' self-exploration, leading to a deeper understanding of their goals, values, current circumstances or action steps needed. Nonverbal gestures such as nodding or using hand movements invite a customer to continue speaking or elaborate on a particular topic. Verbal comments such as "tell me more"; "can you say more about that?" and "Go on" are commonly used phrases. Customers are important resources so it is critical for ACCs to fully explore and elicit more information than originally volunteered. Continuation Responses are often used in combination with other active listening techniques, such as Reflection Statements and Questioning.

Continuation Response Example:

Customer: **"**I am definitely interested in going to Ivy Tech for X-Ray Technician. I know that I would be great at that job."

ACC: "Can you tell me more about that… "***<verbal continuation response>***

Customer: **"**Well, I love to work with people and have always wanted to work in a hospital."

ACC nods head and leans slightly forward ***<non verbal continuation response>***

Customer: "I think I would be really good at making patients feel comfortable. The other stuff I know I can learn."

REFLECTION

Although Continuation Responses are a good way for ACCs to elicit more information from customers, using these may not be appropriate in all situations. What are some situations in which Continuation Responses would be appropriate and some when it would not be the most effective strategy to use Continuation Responses?

_____

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_____

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Providing "Expert Opinions"

Academic and Career Counselors are career and educational information experts and must have up-to-date knowledge to share with customers in developing their career plan including educational opportunities. Academic and Career Counselors are perceived as experts by customers; therefore, information given about educational or occupational opportunities must be accurate and clear. ACCs should never rely on opinion and must be careful to ensure they are not committing the Fundamental Attribution Error when giving career and educational guidance. Any opinion shared by ACCs during career counseling sessions must be strongly rooted in fact. Biased information or information based on opinion can be destructive and confusing for customers.

EXAMPLE

Heidi is a 34 year old mother of 2 children. She is recently divorced and must return to the workforce after 10 years of being a homemaker. She comes to the WorkOne Center to receive guidance about her next steps. She has some experience volunteering at her children's school and waitressing part time when she was in high school. Unfortunately, Heidi does not have a High School Diploma. Heidi thinks she would like to go to training for Business Administration. She took the TABE test and scored on the 11th grade level in both math and reading

Heidi: "I am really interested in getting some training in Business Administration. I know I have to update my computer skills to be competitive."

ACC: "What steps have you taken so far?"

Heidi: "Well, I took the TABE test and the assessments in ICE. They seem to indicate I might like to be in administration. I also looked at some job listings. It seems like there are a lot of job openings."

Providing Subjective Opinion:

ACC: "Well, that's great. It seems like you would be really great in this position. You have a pleasant demeanor. I mean any boss would be lucky to have such a nice person working in their office."

This is not effective. While it is complimentary, customers often believe that all information Academic and Career Counselors share is fact from an "expert." Sharing this kind of information is not helpful to the customer because it is not based in fact or actual occupational research. The ACCs comments may also give the customer a sense of false hope about her current qualifications.

Providing Expert Opinion

ACC: "That seems like a great first step. There does seem to be a great number of job openings in the administrative field. It's great that you've done this preliminary research. The labor market is quite competitive though. Many positions are requiring at least 3 years of recent experience or training. Many employers also want to see a minimum educational level of GED or High School Diploma. Can you think of some steps that you can take to make sure you are qualifying for the positions you apply for?

The ACC in this case starts by positively reinforcing the steps that the customer has taken and the research the customer has done on their own. They then provide up-to-date regional occupational information to the customer about some of the requirements of employers in the administrative field. This gives the customer realistic expectations and can assist the customer in setting goals and developing appropriate action steps. The ACC also asks an open-ended question to help the customer start to plan concrete short-term and long term goal.

All decisions should ultimately be up to customers. ACCs should aim to ensure that customers are making the most informed decisions possible through counseling practices rooted in empowerment. When advising and guiding customers in making informed career and training choices, ACCs must provide only expert opinions based on true and factual information. That information should always be used in the context of customers' personal attributes, strengths, values, experiences and current circumstances.

Throughout all counseling sessions, the partnership between the ACC and customers should be emphasized in order to successfully work toward goals. ACCs must help customers make meaningful connections and organize information to make important decisions about their occupational goals and appropriate action steps to accomplish that goal.

REFLECTION:

How can effectively providing expert opinions help establish trustworthiness and customer engagement?

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ACCs will be most successful when they establish expectations that lead to realistic goals and long-term success.

It is important that customers understand clearly what tasks and responsibilities are required in specific industries. It is also important that customers have a clear understanding of the time requirements and rigor of specific training programs. One way an ACC can assist customers in being successful is to clearly convey this information and ensure customers have a clear understanding of all that will be expected of them.

It is critical to provide expert opinions if a customer's goal or career pathway is unrealistic for his or her current circumstances, educational level or previous experiences. In these cases it may be effective for an ACC to use constructive confrontation to facilitate more realistic goal setting. All expert opinions, coaching and constructive confrontation should be done in a fair and empathetic manner. These conversations should be held with great care to ensure that customers do not become discouraged or disengaged. An ACC must remain positive and provide encouragement, support and access to resources for more realistic options.

CASE STUDY

Lyann is a 20-year-old WorkOne customer. She dropped out of high school in 10th grade. She has worked sporadically as a childcare provider and housekeeper. She has told her ACC that she would like to attend community college and plans to pursue nursing. Her goal is to get a nursing job in a hospital within a year. She stated that she feels like she can do this, because she has cared for sick children periodically.

ACC: "I know you are very excited about becoming a nurse. I think that is great and it seems like you have a lot of good experience. It is important to realize nursing requires substantial amount of education. Have you looked into the educational requirements?"

Lyann: "Well, yeah. I just thought because of all my experience…"

ACC: "Your experience is great but nursing is a field that has strict educational requirements. What do you think a good first step would be?

Lyann: "I know I am going to need my GED before anything probably…"

ACC: "You are right- it may be more effective to focus on the short-term goal of obtaining your GED. You can also look for volunteer and internship opportunities in a hospital to get valuable experience. You might also be able to qualify for the GED+ program and be able to get a certificate related to nursing while you work toward getting your GED."

Providing expert opinions and realistic counseling is a crucial role of the ACC. Effort must be made by the ACC to remain fair. It is important that customers receive factual information to make informed decisions ensuring they can be successful in the occupational and educational path that they are pursuing. Realistic and attainable goals will serve as motivation for customers. Academic and Career Counselors must maintain professional boundaries throughout counseling sessions. Professional boundaries are extremely important when having these difficult conversations or engaging in constructive confrontation.

CONSTRUCTIVE CONFRONTATION

Constructive Confrontation is a strategy for promoting positive behavioral change and ensuring customers are making choices that will allow them to be successful in reaching their goals. Using constructive confrontation, an ACC can effectively address differences that exist and are creating barriers for the customers setting realistic, attainable, educational and occupational goals or taking appropriate action steps towards reaching those goals.

Academic and Career Counselors may find themselves needing to confront behaviors or attitudes of customers that are creating barriers to their goals. Often confrontation is thought of as an attack or argument. This is not always the case- confrontation can be constructive and helpful in academic and career counseling sessions. It is necessary for an Academic and Career Counselor to have difficult conversations with customers during counseling sessions. There may be a need to confront problems that have remained unresolved, differences that are impeding working productively together or actions that seem inappropriate or damaging. Customers may have unrealistic expectations, goals or timeframes for their current circumstances that must be addressed. ACCs must not shy away from these difficult conversations.

Using Constructive Confrontation techniques in these situations ensures continued customer engagement and often strengthens the ACCs relationship with the customer.

EXAMPLES

Gus has been coming to the WorkOne Center for 3 weeks. He tells his ACC that he really wants to go to training to get his CDL. When the ACC checks the customer's casenotes, she sees that Gus has been failing to attend workshops he has signed up for. He also arrives late nearly every day.

ACC: "You have told me repeatedly that you are very interested in attending training but you have failed to attend the workshops you have signed up for and you arrive late to the center often…I am a bit confused. What steps have you taken so far to show that you are serious about attending training?"

The ACC points out the inconsistencies between what Gus is saying and his behaviors in a fair and empathetic way. It is important to allow the customer a chance to consider the situation by following up with an open-ended question.

Riley took the TABE test while at the WorkOne Center. He scored low in both reading and math. He stated that he enjoys the building things and would like to pursue a training program in carpentry that is particularly math intensive. Riley has his High School Diploma and is reluctant to even discuss the possibility of attending Adult Education classes.

ACC: "Riley, I know that you have your High School Diploma and are interested in the carpentry training program. I am concerned in looking at your TABE scores. The carpentry program will require a lot of math in order to be successful. I know that you are anxious to start the training, but I think it would be advantageous for you to boost your math skills before taking on the training. What are some other strategies you can think of to meet the math requirements of this program? Would you be open to attending Adult Education just to boost the math scores, then transition directly into the carpentry program?"

The ACC effectively conveys concern and remains positive throughout the interaction. They provide the necessary information and guidance, and then use open-ended empowering questioning to allow the customer to develop strategies that he feels will be effective for his current situation. This will service to motivate the customer by giving the customer ownership over the action plan being developed.

How to Effectively and Constructively Use Confrontation

1. Gain a full understanding of the issue or challenge that is facing the customer. Ensure the behaviors, actions or thought processes that you want to confront are directly related to the customer's ability to successfully pursue an educational opportunity or enter a specific career field.
2. Ensure the customer is ready to hear your concerns. Check in with the customer by asking permission to give constructive feedback.
3. Acknowledge the customer's position as legitimate for him or her. Focus the conversations as much as possible on behavioral changes.
4. Highlight any discontinuities that have been observed. It may be helpful to point out the discrepancies between what the person is saying and his/her nonverbal behaviors. Do not attack the customer's behaviors or beliefs. It is important to remain positive.

5. When involved in constructive confrontation, eliminate distraction. Stay neutral and avoid taking things personally. Failure to remain neutral may cause you to become defensive and derail the process.
6. Be sure to indicate any concern or confusion. Any advice should always be rooted in current factual information.
7. Ask for customer's preferred solution.
8. Fully explore differences. Treat these as a problem to be solved together. Offer possible options and alternatives as much as possible. A solution or outcome must be mutually agreed upon.

Constructive confrontation is an essential skill for Academic and Career Counselors. ACCs often must quickly recognize customer situations that require confrontation and effectively use constructive confrontation to address the issue. Constructive confrontation must be a deliberate intervention. It must be an active process and should not happen unexpectedly or when the ACC is rushed or limited in time. Confrontation will not be effective if there is not a level of trust between the two parties. There must be an established relationship between the ACC and customer. It is necessary for an ACC to use combination of effective communication techniques including questioning, active listening and reflection statements while engaging in confrontation. Through effective communication, an ACC must also ensure that they have a full understanding of customers' needs and work toward a solution that is mutually agreeable.

Effective Confrontation Techniques

- "We see things differently. What I see is_____"
- "Could it be that…?"
- "You believe_____. On the other hand, I believe_____. The difference is_____."
- "I disagree. Your position is_____. Mine is _____."
- "On one hand, you're saying _____, but you seem to be doing/saying/feeling_____."

REFLECTION

It is necessary to be comfortable using constructive confrontation techniques. What are some factors or situations that might make using constructive confrontation more difficult? What are some strategies you can use to overcome these challenges?

_____

_____

_____

_____

PRACTICE

Read the following statements and write the ACC's constructive confrontation response that is both appropriate and effective.

Customer: "I know that I have a criminal background, but I think I am definitely going to be able to get into the police academy."

_____

_____

_____

_____

Customer: "I told you over and over I just want to get a job. I don't see the reason that I have to look at all those websites. Why can't you just give me the names of the places I should apply."

_____

_____

_____

_____

Customer: (Customer has an odor of alcohol on his breath) "I was late because I was just out looking for jobs."

_____

_____

_____

_____

Constructive confrontation is an important motivating tool. Properly engaging in confrontation helps customers recognize the reasons to initiate or follow through with actions that will allow them to effectively take steps toward achieving realistic and attainable goals.

Academic and Career Counselors must never force a customer into adopting the ACC's preferred solution or make a decision *FOR* a customer. This will disengage customers and may lower their resolve and motivation, which will in turn affect their desire to follow through with the plan.

Confrontation Do's • Listen, pause and allow for silence to reflect and speak • Suspend assumptions and certainties • Give full attention • Speak only for yourself • Observe your own reactions and examine your own assumptions • Problem solve until you both agree on a resolution
Confrontation Don'ts • Interrupt or argue • Attach or make personal judgments • Start questioning using "Why?" This will elicit a defensive response. • Play devil's advocate • Tell "war stories" • Railroad your own solutions, even if you have the power

ADMINISTRATIVE TASKS AND TIME MANAGEMENT

Providing quality service to customers is dependent on Academic and Career Counselors having time management and organizational skills. It is essential that ACCs are adept at multitasking to ensure that all tasks are completed in a timely manner. Many of these tasks have an effect on customers' progress and their ability to reach the goals that have been set. These tasks may include tracking and documenting all customer progress in a timely manner, updating Academic and Career Plans, processing referrals to training providers and providing resources when necessary. In addition, case notes must be kept up-to-date with all customer activities, issues, goals and action steps. This is a particularly important task as it is often the primary communication tool for ACCs and other staff to work together as a service team to assist customers efficiently and effectively.

REFLECTION

How do administrative and logistical tasks directly and indirectly impact the services that you are providing to customers?

_____

_____

_____

How does accomplishing these kinds of tasks timely impact your co-workers or staff from partner agencies?

_____

_____

Time management is a set of common sense skills that help organize time to be most effective and efficient accomplishing necessary tasks.

This leads to increased productivity and allows ACCs to decrease their stress level. ACCs must have a clear prioritization of tasks and responsibilities. Priorities are determined by importance and urgency. Prioritization must take into consideration the assessment of what can be done on a given day and the effects on others' workflow.

Identifying priorities

It may be helpful for an ACC to consider the following questions when creating priorities:

- Assess what can be done in a specific day including daily workplace tasks, interactions with the world and personal life.
- Determine how each task affects one's life and livelihood most significantly at a particular time.

Priorities are likely to change and evolve as they relate to what is important, given the current circumstances. It is often helpful to examine tasks to ensure that they are appropriately prioritized and that an ACC is not spending too much time working on crisis situations or dealing with endless interruptions. There should also not be too much time spent working on unnecessary or wasteful actions.

BRAINSTORM

Make a list of tasks required of you as an Academic and Career Counselor. Try to include as many tasks as possible. Then use the Quadrants below to categorize each task. Once you have identified the Quadrant then prioritize those tasks.

_____

_____

_____

_____

_____

_____

_____

_____

_____

QUADRANT 1: HIGH VALUE /URGENT **"Do it now."** Examples: Customer interruptions, crisis, deadline driven projects, pressing problems.	**QUADRANT 3: LOW VALUE/ URGENT** **"Gotta minute?"** Examples: Unnecessary reports, Time wasters, drop-in visitors, Some mail or phone calls, other people's pressing matters
QUADRANT 2: HIGH VALUE/ NOT URGENT **"I really should…"** Examples: Long term planning, Client needs assessment, New opportunities, training	**QUADRANT 4: LOW VALUE/ NOT URGENT** **"I really shouldn't…"** Examples: Busywork, trivial assignments, time wasters, phone calls, surfing the net

What are some tasks that are in Quadrant 1 or Quadrant 4 that you can eliminate by taking actions proactively? What actions do you feel you need to take to concentrate most of your time in Quadrant 3 and 4?

_____

_____

_____

_____

REFLECTION:

It is important for ACCs to be aware of barriers to effectively managing their time in order to develop proactive strategies to ensure that there is no loss of productivity. Time management barriers can lead to increased stress, missed deadlines and frustration which is likely to affect all aspects of the job.

Please list 2 or 3 strategies of how you overcome each common time management challenge.

No alternative plans

_____

_____

Unclear planning and prioritizing

_____

_____

Lack of flexibility

_____

_____

Large caseloads

_____

_____

Procrastination

_____

_____

Interruptions

_____

_____

Inability to say no

_____

_____

It is necessary for individuals to explore what barriers negatively affect their ability to effectively manage their time. Academic and Career Counselors must develop strategies to ensure these actions, behaviors and potential time management pitfalls do not result in a loss of productivity.

Time Management Strategies

- **Plan for 1 minute- it saves 4-5 minutes in the long-run when completing tasks.**
  Set aside time at the beginning and end of every workday to review your task to do lists. Be realistic in scheduling. Divide all larger projects into smaller short term goals and manageable daily tasks. This will help you track your progress.

- **Identify and organize project goals, tasks and deadlines.**
  It may be helpful to group similar work together whenever possible for maximum efficiency whenever possible. This can easily be visualized when using color coded format for appointments in your Outlook Calendar. Effectively team up, delegate tasks and follow-up when appropriate.

- **Identify priorities and spend your time according to those priorities.**
  Organize your goals based on 2 criteria-urgency and importance. Be sure that you are planning and using your time proactively on tasks according to deadlines and project assignments.

- **Use the tools you have.**
  Use Outlook to effectively and efficiently track customers who you must follow up with, tasks you must accomplish and paperwork deadlines. Use the automatic reminders to help you manage your time throughout the day.

- **Log your activities.**
  Track where time is being spent- including the amount of time spent on interruptions and when you are most productive. This will give you a sense of how you work and what is the required work flow. You will see places where you can improve efficiency by identifying and eliminating time wasters. You will also be able to schedule your tasks for your own "peak performance times." That is the time of day that you are able to be most productive and able to get the most work done.

- **Limit interruptions.**
  Remember to handle interruptions, whether they be drop-in visitors, phone calls, junk emails or other time wasters based on your daily priorities. Minimize drop-ins and make an effort to not be a drop-in for co-workers. Be honest when someone asks, "Do you have a minute?" You may need to learn when and how to say "not right now." Whenever possible, defer interruptions to a more convenient time for you. Try to keep interruptions short. Learn the difference between necessary and unnecessary interruptions. By tracking the interruptions you are facing you may also begin to eliminate them and become more productive.

- **Plan for the unpredictable whenever possible.**
  Always try to include in your schedule time to be spent for when you encounter unpredictable items and situations. Ensure you have a backup plan and remain as flexible as possible.

- **Find your individual motivation and focus.**
  Concentrate on one goal at a time. Break the goal into manageable tasks and track your progress. Try to handle one piece of paper only once. This will encourage you to take action in the moment rather than returning twice to the same spot and shuffling papers without getting any actual work accomplished.
  In order to get through tasks that may be boring and tedious, it may be important to remind yourself of the bigger picture to stay motivated. Think of the advantages when you finish or the feeling of satisfaction you will feel when the complete the obligation or successfully accomplish your objective.

It is most important to have an organizational and time management technique that is used consistently. The systems are only as strong as the commitment to use them. The system should be easily accessible. There are many software programs available to help stay organized. The organization and time management system should give the user an effective way to organize tasks, responsibilities and projects. Adopting an appropriate time management and organizational system will ensure customers receive quality services consistently and follow up occurs timely.

ACCs must combine theories to create a framework for the integrated customized approach to be successful working with customers at the WorkOne Center. ACCs' understanding of counseling foundations ensure that they are able to effectively build rapport and engage customers in the academic and career counseling process. Counseling skills provide tools and specific techniques that can be employed while practically applying theories. Throughout the process it is important ACCs continue to use self-evaluation to assess their strengths, areas that need improvement and develop goals to increase their professional competency.

Goal Setting

Competencies: Decision Making, Communication, Technology, Teaching, Assessment

"Even if you're on the right track, you'll get run over if you just sit there." –Will Rogers

INTRODUCTION

Academic and Career Counselors (ACCs) have the unique opportunity to help customers set goals AND help them stay focused, motivated and on track to achieve those goals. Goals are the high-level aspirations toward which efforts are directed. We often use the goals we have identified to measure success and to guide our actions.

Goals are usually stated in terms of a particular accomplishment to be achieved within a determined amount of time. It is important goals are clearly defined to better understand the necessary steps to achieve these goals. Goal setting with customers is a key component in academic and career counseling. By assisting customers in identifying goals and planning for their future, Academic and Career Counselors are able to support customers in directing their own plans for the future.

Goal setting allows customers to take charge of the process of working towards achieving the identified goals and take ownership of their own achievements.

Effective goal setting results in:

- Improved performance
- Increased motivation to achieve
- Increased pride and satisfaction in achievements
- Improved self-confidence
- Outcomes leading to increased income and life choices

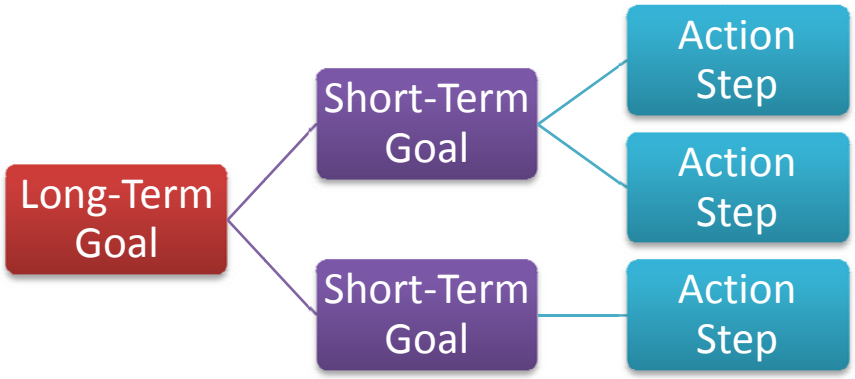
The process of setting goals allows a person to choose where he or she wants to go in life. When individuals know precisely what they want to achieve, they are able to see where to concentrate their focus and time. Effective goal setting gives long-term vision and short- term motivation.

DEFINITIONS

Long-Term Goal:	An individual's dreams and aspirations that often define what the individual wants in life. The goal can be used as a measure of success. Long-term goals can be thought of as a plan for what an individual would like to accomplish in 5 or more years.
Short-Term Goal:	A series of smaller goals that are met as an individual works to reach their established long-term goal. These are goals that can be accomplished in incremental steps within 6 months-1 year time frame.

Action Steps:	The tasks that need to be accomplished while working toward short and long-term goals. These provide a concrete plan for individuals working toward their goals.

One of the most important functions of an Academic and Career Counselor is to assist customers in identifying their goals and action steps for education and careers. Just as important is helping customers stay on track and motivated to achieve that goal. Customers may get "stuck" on the journey to achieving their goals and it is an ACC's job to be aware of a customer's progress and help them get right back on track to successfully reaching his/her goal.



Goal setting is not a static process.

It is a dynamic process in which goals must be constantly revisited and revised continually for clarity, relevance and updates.

REFLECTION

Think about some goals that you have set for yourself (personal or professional). What were these goals? How difficult was the goal setting process? Were you able to achieve these goals? Why or why not?

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What are some of the difficulties you faced in goal setting? What strategies did you use to achieve your goal?

_____

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_____

COOPERATIVE PLANNING AND GOAL SETTING

There are 5 key steps in creating a well-formed cooperative plan between an Academic Career Counselor and a customer:

1. Set concrete measurable goals
2. Develop specific action steps
3. Establish timetables for achieving each goal
4. Assign responsibility for the tasks and ensure both partners know who will do what throughout the process
5. Discuss what criteria will be used to measure how well outcomes are being achieved

Using Previous Successes as a Starting Point

In using the Strengths-Based philosophy, ACCs begin to establish credibility and partner with customers during the first meeting. During this initial meeting, it is important for the ACC to discuss a customers' past successes. The ACC should ask probing open-ended questions to help customers identify the skills that they have which have allowed them to be successful in the past. Through identifying these successes and skills, customers and ACCs develop a positive rapport that is centered on customers' abilities and competencies. Customers are immediately engaged in the goal setting and planning process.

By asking open-ended about previous successes, ACCs will help customers uncover strategies used in the past that have helped them be successful so they begin to utilize the same strategies in the future. ACCs should encourage customers to use "I" statements to focus on what *they* did to be successful.

EXAMPLE

Customer:	After I lost my job, I couldn't afford to continue to pay rent and utilities. It was really horrible.
ACC:	What did you do to resolve the situation?
Customer:	Well, my parents let my kids and I move in with them.
ACC:	That sounds like it must have been really frustrating. What steps did *you* take?
Customer:	Well it wasn't long before I found a new job. It was part time and didn't pay much but it was something. Then, I was able to find a new apartment that I can afford.
ACC:	What did you do to make this happen?
Customer:	I must have filled out a zillion applications. I would leave the house at 8 and not come home till after dark. I also talked to everyone I knew to find out who was hiring.

**If the customer mentions help they received from someone else, the ACC should refocus the customer by asking what he/she did to get that person's help. All questions should be focused on the steps the customer has taken to be successful and identifying strategies that can be used to be successful in the future. It may be a challenge for some customers to recognize the active role they have played in achieving their goals, but is critical to the process for them to own these achievements.*

In getting customers to talk about past successes, it is possible to measure their past achievement. Customers will be able to see themselves as agents of their own success. When customers acknowledge what they have done in the past, they can see what they are capable of currently. It is through this process, by focusing on a customer's strengths, that the ACC can begin the discussion of identifying the customer's goals, and in doing so, start the goal setting process.

As an Academic and Career Counselor, you will focus primarily on a customer's education and career plans. By learning about a customer's past successes – whether academic, career or life oriented – ACCs will have a better idea of what customers have already done, how that experience can help guide or set the stage for their new planning and what they are likely capable of doing in the future. Using these past successes, ACCs will be able to praise and motivate customers to create future successes.

Customer's Role in Goal Setting

Goal setting should be cooperative planning between customers and ACCs. Customers must be an active participant in setting goals that will lead them toward employment and self-sufficiency. In this process, the role customers' play should be to identify the goals that they have and the strategies they would like to use to move toward those goals. The ACC's role should be to identify strategies to support customers in reaching the specific and individualized goals, as well as make sure customers are on track regarding ability, time and the practicality of any given goal. This is one of the most important roles an ACC has.

The customer should always be the primary partner in identifying and articulating the goals. In keeping with this, the goals should be written using the customer's own words. Goals should never be dictated by an ACC or agency staff. The ACC should help the customer make informed and realistic choices, not make the choices *for* the customer. Having the customer articulate individualized goals will ensure that the customer owns the goals and thus will be more likely to follow through with the action steps identified through the planning sessions with the ACC.

EXAMPLE

Goal dictated by ACC:

Customer must attend Adult Education classes to increase TABE results in order to pursue training.

Goal articulated by customer and written in customer voice:

I will attend Adult Education classes three times a week to increase my TABE assessment scores at least 2 grade levels so I can qualify for the CNA training program at Ivy Tech.

Ensuring that goals are articulated by the customer and recorded in the customer voice will empower the customer. It will give the customer ownership over the plan. The customer will then be more likely to take the action steps. It is important that all goals are documented using the first-person customer voice and reflect the goals as developed by the customer

Customers should also be encouraged throughout the process to identify resources that they may need to accomplish the plans that they are developing. Additionally, the ACC should engage the customer to identify any possible barriers he or she may facing while working toward accomplishing the goals. Customers should explore their existing resources to develop a plan to resolve the impediments before the ACC offers suggestions for solutions. This reinforces customers' active engagement throughout the planning and goal setting process.

Academic and Career Counselor's Role in Goal Setting

Decision-making is done primarily by customers with ACCs' support and input. To some, this may seem to imply that the Academic and Career Counselor will have minimal input but this is far from true.

The responsibilities of an ACC during goal setting include:

- Guiding and coaching the customer throughout the entire goal setting process
- Reading, interpreting and applying regional policy
- Understanding and discussing information about training providers and in-demand occupations
- Assisting customers in self-exploration including learning styles, aptitude, motivation, values, strengths and life circumstances
- Offering educational alternatives when appropriate, including non-traditional learning environments and online courses
- Painting the bigger picture for customers so that they can visualize their life after training

ACCs must be prepared to motivate and coach customers if they lose focus, motivation or desire to continue with the established plan to reach their goals. Once the goals are set, ACCs are responsible for helping the customer see the entire process through while monitoring and encouraging them along the way.

Another aspect of an ACC's role in the goal setting process is being able to paint the big picture for customers. Training initiatives should always be taken with a career goal in mind. Thus, education should not be the last step on the customer's journey. ACCs often assist the customer in connecting the "now" of training to the "future" of a career through developing detailed short-term goals and appropriate action steps.

Roles in Goal Setting Process

Customer's Role	Academic and Career Counselor's Role
Identify goals and strategies	Support and motivate customer
Articulate goals and action steps	Monitor customer progress
Decision maker	Guide and coach customer in making realistic and informed decisions

GOAL SETTING AND EDUCATION

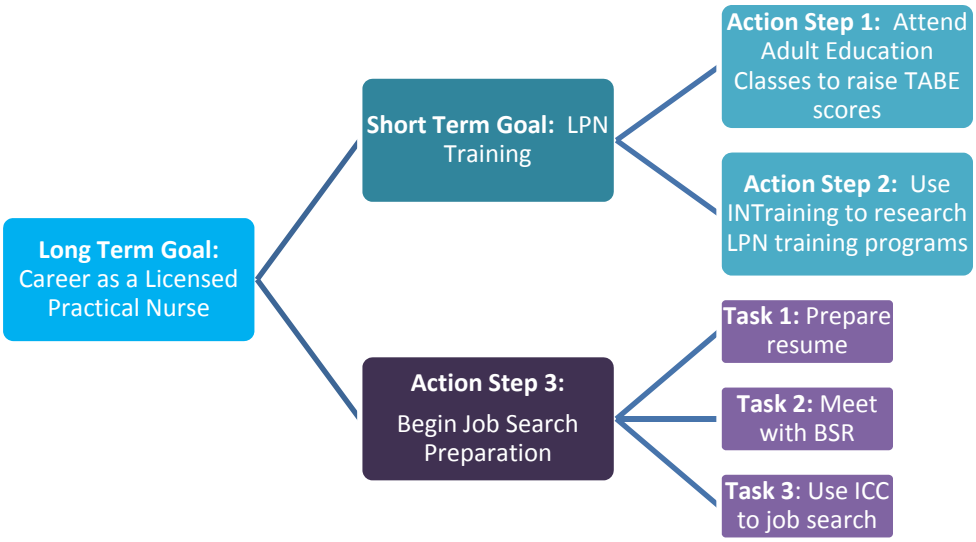
Goal setting at WorkOne Centers should always revolve around the acquisition of a career. However, education is often a necessary short-term goal or action step on the path to achieving that long-term career goal.

For each customer, the extent to which educational goals are included in the goal setting process varies. Some customers may need multiple short-term educational goals, some may need few and others may not need any at all. Each customer will come to an ACC with different backgrounds, life circumstances, strengths and resources. Together, that unique combination sets the framework for developing that individual customer's goals.

EXAMPLE

Jane is a 42-year-old mother of 2 who has been working as a CNA for the past 15 years. Jane has her GED and is CNA certified, but is ready to change careers and become a Licensed Practical Nurse (LPN) because she feels her current income is not enough to provide for her family.

After evaluating Jane's TABE and ICE results, it is determined that if Jane's long-term career goal is to become an LPN, then Jane would have to raise her reading and math TABE scores before she can attend LPN training. After completing training, she would then be eligible to start her new career pathway. After a thorough counseling session Jane's goals and action steps looked something like this:



Jane's first step was to attend Adult Education classes to raise her TABE scores. Her second step was to research LPN schools and programs on INTraining.

Both of these steps are necessary to achieve Jane's short-term goal of getting into LPN training. Once in school, Jane should then begin her 3rd action step which is beginning the job search process. Jane should focus on completing tasks 1-3 so when she nears graduation everything is ready to ensure her success in finding a job.

All of these steps are necessary for Jane to achieve her long-term goal.

SCENARIO

Fred is 22 years old and recently returned from a military deployment overseas. Fred is an airplane mechanic in the military and has successfully completed his Associate's Degree. Fred has realized that in order to obtain stable work as an airplane mechanic he needs to acquire a higher degree or certification. Fred does not need Adult Education.

Use the space below to map out what the goal setting process might look like for Fred.

REFLECTION

What factors do you see influencing a goal setting session with a customer? How will these factors impact the customer's ultimate career goal?

_____

_____

_____

_____

_____

Thinking Goals Through

Academic and Career Counselors can ask open-ended questions when helping customers determine *how* they are going to achieve the goals that they have set. These questions will help customers focus on the short-term goals that lead to achievement.

Some examples of helpful open-ended questions are:

- What skills do you need to achieve this goal?
- What information and knowledge do you need?
- What help, assistance or collaboration do you need while working toward the goal?
- What resources do you need?
- What do you think may block your progress in reaching the goals you set?
- What might be some alternate strategies that can be employed to reach this goal?

S.M.A.R.T Goals

The *way* that goals are set strongly affects how effective the customer will be in achieving them. Goal setting usually involves developing a combination of personal and professional goals which are likely to intertwine and feed into each other. Many personal goals will include some aspects of professional goals. For example, a customer's goal may be to buy a home for his or her family. In order to accomplish this goal, he or she must have a stable income. Therefore, a complementary goal might to be to obtain full-time employment.

ACCs should encourage customers to set goals that are important to them. This makes it more likely that customers will have ample motivation to work towards achieving these goals. It is important to remind the customer that the end goal of a career can be achieved by accomplishing the shorter term goals which may include education and training.

In approaching goal setting with customers, it is important that ACCs adhere to the S.M.A.R.T method. The S.M.A.R.T method is a way to assist a customer in setting goals that are **Specific, Measurable, Attainable, Realistic,** and **Tangible.**

Specific:	Specify the who, what, where, when (time), why and how of the goal.
Measurable:	Clear, concrete, objective measures associated with the goal like "how much" or "how many" or "what will achievement look like" and often in terms of "by when" or "in what timeframe."
Attainable:	It is imperative to not overestimate capacity or underestimate barriers in setting goals (which can end in frustration or giving up) but also to make sure the goal isn't so easy that it's not a challenge to strive for.

Realistic:	The goal must be one the customer is willing and able to work toward and achieve and truly believe he or she will successfully reach.
Tangible:	One must be able to see, hear, smell, taste, touch and experience the goal. Tangible goals aren't just 'feelings' but real experienced changes in your life and situation.

Specific

When working with a customer to set goals, ACCs should ensure that the goal statement is precise. Dates, times and amounts should be included so that achievement has enough specificity to accurately measure if the desired outcome was achieved. Customers will gain a sense of real achievement, satisfaction and continued motivation when the desired outcome is accomplished. Focusing on specifics of the goals will help the customer to visualize the process.

Consider the following goal that is not specific and the changes made to make the goal more effective.

Goal: I will get a job.

This goal is not specific enough to be helpful. There is no timeline attached to the statement. The lack of timeline means it would be difficult to determine when to evaluate the outcome. There are also no details of what kind of job is desired.

Revised Goal: I will get a job as a Pharmacy Technician in 3 months after completing the Pharmacy Technician training program.

This goal fulfills the specific requirement by including a timeline and articulating a particular occupation. The success of this goal may be evaluated the end of 3 months to determine whether the goal was met or not.

Effective goals should be as specific and detailed as possible. There should be a specific detail and time limits included in every goal. Ensuring that goal statements are explicit helps both customers and ACCs know what the desired outcome is and when it should be achieved. This in turn gives a target and helps customers remain focused.

Measurable

The goal should be stated with clear objective measures so customers and ACCs can later evaluate if the goal has been successfully met.

Consider the following goal that is not measurable and the changes made to make the goal more effective.

Goal: I will do my best to look into some trainings.

It is very hard to define what is meant by "do my best." This language is subjective. There is no discussion concerning how long a customer will investigate trainings or even what the customer will do during their investigation.

Revised Goal: I will research 3 training programs that offer CNA certification on INTraining by next Tuesday.

This goal fulfills the measurable aspect of S.M.A.R.T goal setting because one can easily measure the outcomes. Both the time limit and the number of trainings researched are clear facts that can be objectively counted and observed.

By setting reasonable time limits, customers can work at their goals and determine how successful they have been. They can also spur more specific action steps to help move toward achieving the stated goal. Time limits help keep goals in perspective.

Attainable

Once the goal has been identified, ACCs and customers need to cooperatively develop action steps that will help accomplish the goal. It is important to keep in mind what steps need to occur in order to make the goal a reality. Almost any goal can be attained if the steps are planned and there is a reasonable time frame to accomplish them.

It is necessary for ACCs to coach customers to keep all action steps reasonable in terms of size and scale so that they are achievable. If a goal is too large, a customer may not see the progress he or she is making toward achieving it or may become overwhelmed by the task. Conversely, if the goal is too small or too easy to achieve, there may be low motivation or energy to work toward it. "Right-sized" steps make it possible to accomplish action steps, see progress and maintain a perspective of a real and attainable path ahead.

Many WorkOne customers feel overwhelmed while setting goals. Without being dishonest or condescending, in certain cases it may be valuable to set some "quick win" or easily attainable sub-goals at the beginning of the goal setting process. This can help the customers gain momentum and the belief they can take these steps along their desired pathway.

Consider the following goal that is not attainable and the changes made to make the goal more effective.

Goal: I will open my own auto mechanic company in a year and hire 15 people.

This goal is not attainable because it likely takes far more time than one year to open a company of that sort (business plan, capital, permitting/code, build out, etc. etc.), especially if the customer is just now starting on this goal. The goal is very large and having such a large goal standing alone may actually prevent the customer from ever reaching it. Breaking down the goal to more attainable, smaller goals will allow the customer to move further faster.

Revised Goal: I will research how to start my own company within the next two years.

This goal is attainable, but not challenging enough to be meaningful. While for some individuals we need to "slow down" the steps and scale of the goals to make them attainable, for most, there will also be options that are too attainable and thus not meaningful.

Further Revised Goals:
-I will research the requirements for owning and operating an auto mechanic company within two months.
-I will enroll in the Automotive Technician career certification program.
-I will enroll in business management training to prepare for management responsibilities.

This goal breaks down the original larger goal into several more attainable concepts or short-term goals and action steps. Researching the requirements for owning a company is a vital first step if the customer wishes to open such a company. Additionally, proper training and certification is integral to becoming an automotive technician. The GED+ is an excellent program that will provide the customer with the necessary basic skills remediation if required. Proper management training is also necessary before owning and operating a business. It is completely reasonable that a customer would be able to complete both these goals as stated.

When customers begin to identify goals that he or she is able to accomplish, their confidence will be elevated.

Realistic

Goals should make sense in terms of customers' experience, education, skills, values, interests and personal traits. Academic and Career Counselors should work with customers to ensure goals are sensible for that individual and his or her unique circumstances

Consider the following goal that is not realistic and the changes made to make the goal more effective.

Goal: In the next month, I will get a job as a Registered Nurse at the local hospital.

This goal is realistic if, and only if, the customer has already completed the required schooling. It is not realistic for a customer who has not started college yet.

Revised Goal: In the next month, I will apply to college as a biology major (with an aim to an eventual career in Nursing).

This goal is much more realistic. It is possible for a customer to apply to college in one month's time. This goal is the first step toward becoming a nurse and the customer will gain the necessary foundational knowledge to enter a nursing program.

It is imperative that ACCs work to help customers set realistic goals. This may mean coaching customers using information from assessments and the regional job market to form goals that are attainable in the current regional economic environment. Often these conversations may be difficult if a customer has set unrealistically high goals for themselves.

There are several reasons that one may set unrealistically high goals.

- A customer may be wishing that the goal could be accomplished rather than constructing a goal based on reality.
- The goal-setter may have insufficient information concerning the skills, knowledge and work required to achieve a specific goal.
- The person is highly motivated and refuses to acknowledge the need for downtime or the challenges and natural or external delays likely to occur in the process of working toward a goal. If this is the case, the individual is at risk for burning out before the goal is complete or becoming frustrated with slow progress.

While some goals are set prohibitively high, it is important for ACCs to remind customers that "realistic" is also not a synonym for easy. Realistic goals are ones that can be attained with a reasonable amount of effort.

Tangible

A goal is tangible when it can be experienced through at least one of the senses: taste, touch, smell, sight or hearing. Customers may often develop goals to modify their attitudes, outlooks or feelings. While this is a great place to start, it is important to steer customers toward concrete and tangible goals that can produce real change in their lives.

Consider the following goal that is not tangible and the changes made to make the goal more effective.

Goal: I will try to have a more positive outlook while in school.

While this goal is a great one, it does not meet the criteria of a S.M.A.R.T goal because a "positive outlook" is not tangible. There is no way to objectively measure, reference or work toward a positive outlook because it is completely subjective.

Revised Goal: I will write a positive quote for the day in my notebook, engage with my classmates and teacher, and do my assignments on time.

This goal is tangible – the goal contains real objective behaviors. Working toward this goal will most likely create a more pleasant classroom environment for the customer and therefore allow the customer to view the time in class in a more positive manner. By including the writing of a positive quote, the customer is still concentrating on a "positive outlook." The behaviors that are detailed will necessarily create a more positive environment.

Goals that are intangible, like personality characteristics or behavior patterns, may be necessary in order to make a tangible goal occur but are hard to measure and see. These types of goals may be important starting points but it is more effective to coach the customer to focus the goal statement on the tangible way that the outcome will be measured. By having tangible goals, customers are able to track real changes in their progress. It is also easier for ACCs to hold customers accountable for tangible goals than for intangible goals that are often invisible to anyone other than the customer.

THE ACADEMIC AND CAREER PLAN AND INDIVIDUAL SERVICE STRATEGY (ACP)

The Academic and Career Plan is comprised of nine sections designed to capture as much pertinent information about the customer's goals, action steps and progress. This document also includes the Individual Service Strategy used commonly with youth customers. The ACP is meant to be a comprehensive, living document that can be accessed to track progress, review action steps and ensure customers are progressing toward reaching their individual academic and career goals.
For more detailed information about how to complete the ACP, see the ACP Guide and Completed Sample located in the Appendix Section. There may be regional differences and for more information about what is required in specific offices, ACCs can speak with local management.

<u>The Academic and Career Plan and Individual Service Strategy includes:</u>
SECTION I-IDENTIFICATION

SECTION II- INFORMATIONAL INTERVIEW*- This section will generally be completed with the Case Manager and includes basic customer information including:*

- Purpose for visit
- Educational Background
- Work History
- Needs and Barriers
- Customer Track
- Next Steps

SECTION III-EMPLOYMENT PLAN*-This section will be completed by ACCs. This section will be the plan for the customer's success. It includes information about the following:*

- Field of Interest
  - Career Goal
- Strengths and Weaknesses
  - Strengths
  - Notes
  - Weaknesses
- Needs and Barriers
  - Needs and Barriers
  - Plan for Overcoming Needs and Barriers
  - Action Steps

    - Notes
- Employment Goals
    - Work History
    - Long-Term Employment Goal and Short-Term Employment Goal
    - Job Search Strategy
    - Notes
- Education Goals
    - Long-Term Education Goal and Short-Term Education Goal
    - Strategy for Achievement
    - Notes
- Goals and Interests
    - Date
    - Goal Type
    - Description
    - Action Step
    - Status
    - Planned Date of Attainment
    - Date of Attainment
- Training Plan
    - Co-Enrolled in Adult Education
    - Co-Enrolled in WIA Adult/Youth
    - Occupational Skills Needs
    - Date Drug Test Administered
    - Results
    - Enrollment Date
    - Training Provider/ ID and Training Program /ID
    - Completion Date
    - GED+
    - Adult Education/ Remediation Needs
    - Assistive Technology Needs for Persons with Disabilities for Attaining Career Goals
    - Required Supportive Services During Active Participation
    - Post-Employment Needs
    - Customer Progress Review
    - Notes

SECTION IV-YOUTH ELEMENTS*- the Ten Youth Elements should be completed for all youth customers. Every element should be discussed at length so customers are informed of all available services. The planned services can be indicated by checking the boxes and detailing the activities proposed.*

- Tutoring, Study Skills and Dropout Prevention Strategies
- Alternative Secondary School Services
- Summer Employment Opportunities

- Paid and Unpaid Work Exploration
- Occupational Skill Training
- Leadership Development
- Adult Mentoring
- Comprehensive Guidance and Counseling
- Supportive Services
- Follow-up Services

SECTION V- FINANCIAL PLAN*- This section should list the customer's plan for funding any training or educational pursuits including any financial assistance received.*

- Grant/Scholarship Issued
    - Begin Date
    - End Date
    - Amount
- Demand Occupation (O*NET-SOC)
- Customer Contribution
- Total Funds Available
- Program Cost
- Balance of Funds Less Program Cost

SECTION VI- RE-EMPLOYMENT AND ELIGIBILITY ASSESSMENT*-This section should indicate if the customer is identified as a REA customer.*

- Is Customer Enrolled in REA
- Is a Signed Individual Reemployment Program Agreement on File

SECTION VII-TESTING INFORMATION*- All assessments, date taken, results and interpretation/notes should be indicated on this section:*

- COMPASS/ACCUPLACER
- Indiana Career Explorer
- Worldwide Interactive Network
- WorkKeys
- Other Assessments
- TABE
- TABE CLAS-E

SECTION VIII-CUSTOMER COMMITMENT*- This section requires the customer's signature to acknowledge that they have agreed and committed to the information and plan contained in the document.*

SECTION IX-PROGRESS AND REVIEW*- This section can be used to keep track of a customer's progress. There should be no reason to backdate information as all notes should be entered with 24 hours of the check-in. Any changes should be detailed and documented appropriately in this section.*

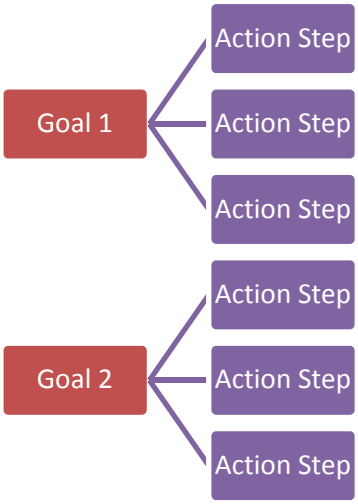
- Date
- Type
- Notes

THE ACP AND GOAL SETTING

The *Academic and Career Plan and Individual Service Strategy (ACP)* is the primary document used by Academic and Career Counselors at WorkOne Centers and the backbone in the goal setting process. It is through the ACP that customer's goals and action steps are clearly documented. This ensures that accountability is clearly defined and progress is tracked which can increase customers' motivation and engagement. The sections most often used to record goals and action plans is **Section III- Employment Plan**.

This section should be completed after customers have met with a case manager and completed their Informational Interview. Customers should have already taken the necessary assessments and are now ready to work on developing the plan for success.

Typically a long-term goal (such as a career) requires some short-term goals (such as education). When recording goals in the ACP it is important to note that long and short-term goals are equally important and both types require their own set of action steps. Action steps should be short term objectives or "mini goals" that act as milestones to measure progress towards achieving a long-term goal.



Breaking the goal into shorter steps may make the achievement less daunting for customers. The portion of the ACP related to goal setting offers ACCs and customers the opportunity to record separate goals with associated action steps. Additional goals and action steps can be added as necessary. For each goal identified, the ACP requires the ACC to record the date the goal was set, the type of goal, a description, action steps, status, a planned goal attainment date and an actual date of attainment. All of this information should be decided via a collaborative partnership in academic and career counseling

sessions between the customer and the ACC. The customer should always be the ultimate decision maker. The ACC should serve as a guide, provide professional opinions as necessary and record all information in the ACP.

Referring back to the goal setting scenario with Jane from earlier in the section, appropriate goals and action steps were developed.

Those goals and action steps can be used to effectively complete the Academic and Career Plan for Jane.

JANE'S ACP –GOALS AND INTERESTS EXAMPLE

Goals and Interests1

Date Set: 08/24/2011

Goal Type: Basic Skills

Description: Increase my TABE math and reading scores by 2 grade levels to qualify for LPN training program.

Action Step1: Enroll in an adult education program that offers night classes.

Action Step 2: Develop backup childcare plans in case of emergency.

Action Step 3: Budget for additional transportation costs associated with attending adult education classes.

Action Step 4: I will attend adult education classes with a 98% attendance rate.

Status: Set but attainment pending

Planned Date of Attainment: 11/24/2011
Date of Attainment: mm/dd/yyyy

Goals and Interests 2

Date Set: 08/24/2011

Goal Type: Training

Description: Acquire LPN degree/ certification through a quality training provider.

Action Step1: I will identify 5 potential providers using INTraining

Action Step 2: Visit each provider, talk to admissions reps and other students.

Action Step 3: Meet with ACC to discuss best fit provider and complete enrollment

Action Step 4: I will attend LPN training with a 98% attendance rate.

Status: Set but attainment pending

Planned Date of Attainment: 3/24/2012
Date of Attainment: mm/dd/yyyy

Goals and Interests 3

Date Set: 08/24/2011

Goal Type: Career

Description: Obtain a full time position in a hospital as an LPN within 2 months of my graduation.

Action Step1: Research LPN jobs in hospitals to identify specific employment requirements.

Action Step 2: Create back up plans for my childcare and transportation in case of emergencies.

Action Step 3: Acquire work appropriate scrubs and appropriate interview attire.

Action Step 4: Use Indiana Career Explorer to identify 5 possible job opportunities.

Action Step 5: Meet with business service reps regarding open job opportunities that I qualify for.

Action Step 6: Develop a backup plan of extending my career goal to outside of hospitals if job is not secured by planned attainment date.

Status: Set but attainment pending

Planned Date of Attainment: 5/24/2012
Date of Attainment: mm/dd/yyyy

Goals and Interests 4

Date Set: 08/24/2011

Goal Type: Work Readiness

Description: Complete all steps necessary to be fully prepared for employment upon my graduation from LPN school.

Action Step1:	Attend resume workshop and complete resume
Action Step 2:	Conduct occupational research on careers in phlebotomy.
Action Step 3:	Attend 1 interview workshop and complete 3 mock interviews.
Action Step 4:	Investigate current internship/volunteer experiences available to gather work related experience in the field.
Status:	Set but attainment pending
Planned Date of Attainment: 3/24/2012 **Date of Attainment:** mm/dd/yyyy	

Reflection

How did the goal setting section in the ACP for Jane differ from the visual mapping goal setting exercise we did earlier for Jane? How do you anticipate goal setting sessions with your customers changing after seeing the goals written out in the ACP?

_____

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What other goals might you encourage Jane to set? Does the ACP accurately reflect everything Jane needs to do in order to accomplish her career goal?

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_____

Jane currently has her GED and a certificate as a CAN. Based on local and state policy, would Jane be eligible for training through the WorkOne Centers? Why or why not? If Jane was not eligible for assistance in pursing her educational goals how would that have impacted your session with Jane? What would you do and how would you help Jane?

_____

_____

_____

EXERCISE:

Now it's your turn! Look at the career pathway map that you developed earlier for Fred and complete the ACP thoroughly and accurately to reflect Fred's goals and the necessary action steps. Remember to write the goals in the customer's voice and using the SMART method!

Goals and Interests 1

Date Set:

Goal Type: (Basic Skills, Family, GED, Lifestyle, Self-Sufficiency, Training, Work Readiness, Career)

Description:

Action Step 1:

Action Step 2:

Action Step 3:

Action Step 4:

Status: (Attained, Set but attainment pending, Set but unattained)

Planned Date of Attainment:
Date of Attainment:

Goals and Interests 2

Date Set: mm/dd/yyyy

Goal Type: (Basic Skills, Family, GED, Lifestyle, Self-Sufficiency, Training, Work Readiness, Career)

Description:

Action Step 1:

Action Step 2:

Action Step 3:

Action Step 4:

Status: (Attained, Set but attainment pending, Set but unattained)

Planned Date of Attainment: mm/dd/yyyy
Date of Attainment: mm/dd/yyyy

Goals and Interests 3

Date Set: mm/dd/yyyy

Goal Type: (Basic Skills, Family, GED, Lifestyle, Self-Sufficiency, Training, Work Readiness, Career)

Description:

Action Step 1:

Action Step 2:

Action Step 3:

Action Step 4:

Status: (Attained, Set but attainment pending, Set but unattained)

Planned Date of Attainment: mm/dd/yyyy
Date of Attainment: mm/dd/yyyy

REFLECTION

In what ways does the ACP allow for a more focused and targeted approach to goal setting for WorkOne customers? What were the most challenging aspects of using the ACP to record the goal setting process? What can you do to overcome those challenges?

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DIFFICULT CONVERSATIONS

Very often, ACCs will find themselves having difficult conversations with customers concerning goals and career plans. Using the Strength-Based approach to empower customers and having a good in-depth understanding of career pathway and training options available is important for effective academic and career counseling sessions. Following the S.M.A.R.T method of goal setting will help also minimize the amount of difficult conversations necessary. However, no matter how knowledgeable the ACC is or how well the ACC sticks to the S.M.A.R.T method, difficult conversations will sometimes have to occur.

Difficult conversations can come about when discussing a customer's past, current or future circumstance and experiences, types of trainings available and career decisions. Being prepared for difficult conversations with customers will make them easier when they inevitably arise.

It is important to remember the following points when having these conversations:

- Use Constructive Confrontation
- Remain positive
- Use effective communication techniques
- Focus on long-term goals and immediate action steps

The Counseling Skills section of this manual has more information about using Constructive Confrontation and how to handle difficult conversations.

REFLECTION

Anne comes to see you and is interested in a career working in a hospital. Anne does not have a GED and has low TABE scores. Her ICE results also state that healthcare is low on her career interest inventory. Additionally, Anne has a criminal background related to drug use and struggles with substance abuse.

When speaking with Anne, what key points would you bring up about Anne's career aspirations?

_____

_____

_____

_____

In your professional opinion should Anne pursue a career in the medical field? Why or why not?

_____

_____

_____

_____

What barriers does Anne face that would impact her achieving her career goal?

_____

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_____

How would you have this "difficult" conversation with Anne and what specific goals would you try to help Anne set?

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EFFECTIVE GOAL SETTING STRATEGIES

- ☑ *Proactively involve the customer* in every step of the goal setting process. Promote customer ownership and accountability in accomplishing the goals successfully. Goals must be the customer's own. Goals should be compatible with the customer's values and career interests.

- ☑ It is imperative to *ask the customer open-ended questions* to promote ownership of the goals. The Academic and Career Counselor must always ask for suggestions from the customer before giving suggestions when trying to solve an issue.

- ☑ If there are several goals developed in the process, they should be *prioritized.* This will help the customer feel less overwhelmed and will direct the customer's attention to what should be accomplished first. The customer should set his or her own priorities with the guidance of the case management staff. This will reinforce for a customer that he or she can, and should be, making decisions for his or herself. It also further promotes ownership of the entire goal setting process. Career Pathways are a great way to visualize the prioritizing for the customer.

- ☑ Academic and Career Counselors should support the customer and *ensure the goals set and timetables are realistic and defined.* ACCs are expected to coach customers using factual information to ensure that the customers' goals are realistic given their experience and skill set.

- ☑ *Customers should be the primary partner* to set the timetable for accomplishing goals. This reinforces that customers are capable of making their own decisions.

- ☑ It is important to *write out goals*. This makes them real and concrete. It also helps to avoid confusion giving the goals credibility.

- ☑ Have customers read aloud the list of action steps and tasks to further *reinforce ownership.*

- ☑ *Use identified long term plans* (career) *to set short term goals* (education and training).

- ☑ Goals should be *realistic and adaptable.* Customers should be able to achieve the goal. Careful consideration must be given to ensure goals are in line with customers' previous experiences, current life circumstance, skills and abilities. Other factors like the employment market should also be considered when ensuring goals are realistic. Goals should also be *adaptable*. It is necessary to reevaluate and revise goals. Setting goals is not a static process.

- ☑ *Sign the plan with the customer*. This will serve as a *symbol of commitment* by customers and Academic and Career Counselors. Ask customers to review each part of the plan, including long term goals, short term goals and action steps. Ensure that customers are comfortable with the plan.

- ☑ *Document all steps* taken toward accomplishing the goals, as well as any changes to the plan in the customer's case notes.

Occupational Information, Resources and Technology

Competencies: Decision Making, Referral, Teaching, Technology, Research, Evaluation

INTRODUCTION

Having up to date, accurate information about occupations and in-demand industries is a key component in being successful in academic and career counseling. Most, if not all, of these resources are available via the web or electronic databases. Making these resources available online has helped ACCs efficiently locate educational and career-related information that supports their work with customers and allowing more time to devote to counseling and coaching. Academic and Career Counselors should be adept at navigating this technology and accessing appropriate information in order to provide high-level customer service. Most importantly, ACCs should be able to do the following when it comes to occupational information and resources:

- Know where to find and how to access relevant and up-to-date occupational information
- Be able to interpret and analyze the information uncovered
- Apply the information to assist customers in making informed career and educational choices

Accurate occupational information helps customers find not "just a job," but a ***career*** that they will love, excel in and retain long-term. The process for identifying a career starts with career inventories and assessments that help customers identify possible career targets. Once career interests are identified, applicable occupational information can be accessed and integrated. This combination of information (knowledge about the customer's personal attributes **and** occupational information) leads to more practical and S.M.A.R.T. goals that align with both the customer's interests and today's job market.

REFLECTION

Occupational information plays a significant role in the Trait and Factor Theory. It should, however, also play a significant role in the Life Span Theory. Please explain the role that occupational information should play in each of the stages identified by the Life Span Theory.

Exploration:

_____

_____

Establishment:

_____

_____

Maintenance:

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_____

Disengagement:

_____

_____

Remember to use the Strength-Based approach to work with customers to empower and educate them on how to access electronic and web-based information. This approach helps customers build ongoing problem solving and researching capabilities. Customers will then be more prepared to access and use information as they continue their lifelong journey of career exploration and development.

TERMINOLOGY

Occupational Information: All pertinent facts about a job, or job cluster/industry, which accurately define the characteristics and requirements of the job so that an individual looking for work will have correct, adequate information for making an occupational decision.

The Labor Market: The market in which workers compete for jobs and employers compete for workers.

Crosswalking: The ability to systemically relate one database to another with ease allowing for an increased access to pertinent information.

Example*:* Indiana Career Explorer crosswalks with O*NET, ICC, and INTraining allowing quick and easy access to occupational information, employment opportunities and training programs and providers.

OCCUPATIONAL INFORMATION

Academic and Career Counselors are often viewed as experts when it comes to providing information and advice on occupations and education. Therefore, having accurate and up-to-date information and relaying that information in a clear and concise manner is crucial. Providing expert information and "professional opinions" should always be based on factual information and never personal opinions. ACCs should be careful not to let their own opinions or experiences sway the content and the way they deliver occupational information. Biased information or information based on opinion can be destructive and confusing to customers.

For more information concerning using Expert Opinions, please see the Counseling Skills section of this manual.

Exploring Occupational Information

Occupational information provides information about specific jobs, industries or career clusters and often includes the following information:

- A description of the occupation
- Qualifications for entry
- Necessary education/training
- Working conditions
- Salary

Some resources provide additional information such as labor market statistics, career ladders and pathways, dynamic links to similar occupations in broader categories, links to training/education, examples and special information for women and culturally diverse populations.

It is important for ACCs to have access to as much information as possible while providing expert opinions, guidance and coaching to customers in the academic and career counseling process. Knowledge of where to find and how to access resources is a key factor in being a successful ACC. Technology has made it much easier to access up-to-date information via the internet, but it still requires skill to quickly locate sources for timely and reliable information.

Career Guide to Industries (CGI) & Occupational Outlook Handbook (OOH)

The Career Guide to Industries and Occupational Outlook Handbook can be great sources of information for customers beginning to research careers or explore career options. Both documents are published by the Bureau of Labor Statistics and are revised every two years. Each WorkOne Center should have hard copies of the most recent CGI and OOH on hand for easy reference. If the CGI and OOH at a WorkOne Center are out of date, the publications can also be accessed online at the Bureau of Labor Statistics website (www.bls.gov).

The Career Guide to Industries can be a good first step for customers who may be interested in researching a new field, but lack information about what kind of jobs exist in that industry. The CGI explains the nature and working conditions of different industries and lists of some of the general career paths a person may take within each industry. The CGI also breaks down the national median wages and projected growth of different jobs in each industry.

The Occupational Outlook Handbook can provide more detailed information on the training and education needed to qualify for a specific occupation, the kinds of tasks workers may be responsible for in that occupation and the outlook for the job market. Customers whose career interests are confirmed by the CGI and OOH and wish to dig deeper in their career research, may find a wealth of information using O*NET.

O*NET

Although there are a number of resources for occupational information, O*NET is the most popular and comprehensive resource currently available. O*NET was developed by the U.S. Department of Labor/Employment and Training Administration (USDOL/ETA) and serves as the basis for many of the national and state comprehensive systems.

O*NET is currently crosswalked with multiple WorkOne databases and assessment systems including:

- Indiana Career Explorer (ICE)
- Indiana Career Connect
- WorkKeys

The capability for O*NET to crosswalk with these frequently used WorkOne databases and systems helps ensure the continued accuracy and recency of the occupational information that ACCs provide to customers.

O*NET organizes its information using a Standard Occupation Classification (SOC) code number taxonomy. This system is used by Federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating or disseminating data. There are 840 detailed occupations classified into 461 broad occupations, 97 minor groups and 23 major groups. For each occupation, O*NET provides the following information:

Tasks	Knowledge	Skills	Work Activities	Work Context
Intersts	Work Values	Related Occupations	Job Zones	Wages and Employment

The wages and employment link at the bottom of the page provides national data and the option to select specific states for more accurate state wage and employment information. Within ICE, the O*NET information is already crosswalked to Indiana specific data. Additionally, the occupational information in ICE pulls O*NET data and allows the user to see specific occupational pathways based on career interest, educational levels and work values. However, ICE does have some limitations with regards to occupational research for an ACC. Occupational research within ICE can only be done within the confines of a particular customer's assessment results. ACCs can access this occupational information via the composite reports and then explore one of the 16 career clusters to expand from there. The purpose of occupational research within ICE is to explore occupational information as it relates to the customer's assessment results. ICE does not provide a search option box which makes general occupational research a little more cumbersome. O*NET provides a wide variety of ways to research occupational information that is succinct and user friendly.

Searching O*NET

O*NET provides a variety of search options that can help ACCs and customers explore occupational information in numerous ways.

Search Option	Description
Keyword	Allows user to search by any keyword and narrow down from there. Example: Nursing
SOC Code	Allows user to enter a specific SOC code to bring up more targeted and specific information
Bright Outlook	Allows user to search jobs expected to grow rapidly in the next several years
Career Cluster	Provides the opportunity to search occupations in the same field of work that require similar skills. Career Clusters can be used to help focus education plans towards obtaining the necessary knowledge, competencies and training for success in a particular career pathway.
Green Economy	The green economy will cause a change in occupations' employment demand or work and worker requirements such as tasks, skills, knowledge and credentials. Green occupations are linked to Green Economy Sectors.

Industry	Allows user to search by broad groups of businesses or organizations with similar activities, products, or services. Occupations are considered part of an industry based on their employment.
Job Families	Provides the opportunity to search groups of occupations based upon work performed, skills, education, training and credentials
Job Zone	Job Zones group occupations into one of five categories based on levels of education, experience and training necessary to perform the occupation.
STEM Discipline	Find occupations that require education in science, technology, engineering and mathematics (STEM) disciplines.

ACTIVITY

Visit http://online.onetcenter.org/ and explore occupational information for Welding. Then log into Indiana Career Explorer (www.indianacareerexplorer.com) and explore Welding through ICE.

REFLECTION

What were some of the differences between O*NET and ICE from a user standpoint? Was one site easier to use than another?

_____

_____

_____

Which one would you prefer to use and why?

_____

_____

_____

_____

How would you "sell" your customer on the benefits of using occupational information? Would you recommend they use O*NET directly or ICE? Explain why or why not.

_____

_____

_____

_____

_____

PRACTICE

Please use O*Net to explore occupational information about Welding.

Tasks:

_____

_____

Knowledge and Skills:

_____

_____

Interests:

_____

_____

Work Activities:

_____

_____

Work Values and Context:

_____

_____

Wage:

_____

Related Occupations:

_____

_____

My Next Move

The creators of O*Net developed a web application, **My Next Move,** to provide occupational information and assist job seekers with exploring potential careers an occupations. This site can be more user-friendly than O*Net.

My Next Move (www.mynextmove.org) is an excellent website for Case Managers, Academic and Career Counselors, and job seekers. The site allows the user to search careers via keywords or browse careers by industry. Since the information is linked to the data in O*Net, the information is accurate and up-to-date.

The site provides a list of careers in the following categories:

- *Bright Outlook:* New job opportunities that are likely in the future, including careers that:
  - Will grow rapidly in the next few years
  - Will have large numbers of openings
  - Are new and emerging careers
- *Green:* Occupations that the "green economy" will impact by increasing demand, changing the kind of work and skills needed and creating new types or categories of work.
- *Registered Apprenticeships*: Careers in which there are apprenticeships registered with the Department of Labor. An apprenticeship is a valuable opportunity where workers can earn a paycheck while participating in on-the-job skill building.

My Next Move takes career exploration beyond basic occupational information and is an excellent resource and reference for customers. It is easy to use, informational, and provides great snap shots of career information.

How does My Next Move differ from O*Net? Which are you more likely to use and recommend for your customers? Why?

_____

_____

THE LABOR MARKET

Information about the Labor Market and Occupational Information go hand in hand, Both are needed to make informed career and educational decisions. The "labor market" is a term used to describe the market in which workers compete for jobs and employers compete for workers. Labor market conversations involve discussions about occupational trends, employment projections and typically refer to data that has been collected and analyzed by the Bureau of Labor Statistics (BLS).

The BLS gathers historic and projected data on the expected number of jobs in a given industry or occupation. The data can then be used in a variety of ways. It helps by determining what occupations the workforce system should focus job development and training efforts on. This in turn, influences an individual job seeker's career and educational planning.

National vs. State Labor Markets

The national labor market refers to the employment and wage trends on a national level. While these are important to be aware of, knowledge of state employment and wage trends are often more valuable to Academic and Career Counselors. It is critical to know the reliable resources for attainment of labor market data, as some are outdated, unreliable and have invalidated research.

The following recommended resources should be used when researching labor market trends:

Resource	Web Address	National vs. State
U.S. Bureau of Labor Statistics	http://www.bls.gov	National
O*NET	http://www.onetonline.org	National
States' Career Clusters Initiative	http://wwwcareeerclusters.org	National
Hoosiers by the Numbers	http://www.hoosierdata.in.gov	State/Regional
Stats Indiana	http://www.stats.indiana.edu	State/Regional
Hoosier Hot 50	http://www.hoosierhot50.com	State

Using Labor Market Data

Data is just that – data. Often, raw numbers and data don't by themselves tell customers anything. To be successful, ACCs must be able to interpret the data and help customers use it appropriately to in order make educated decisions about their chosen career goals.

- Detail is key. Growth or change in a major occupational area or cluster is so general that it cannot reflect the specific changes in any one occupation. Growth within a specific industry doesn't necessarily mean growth in all related jobs. For example, growth at a senior level within a sub-field may not always mean growth at the entry level. It is vitally important that ACCs monitor the job boards and other community indicators to know what types of positions are in demand for their regions, in addition to using occupational projections. For example, if the expected growth for management in an area is high, an ACC needs to know if local employers are hiring for entry-level management or for CEOs!
- Scale is also key. Labor market projections show percentage of growth and number of replacements, but also the total number of jobs in a field. High projected growth in a position may not mean that there will be a lot of jobs opening up. Conversely, a lower percent change in

a field may not mean there will be no opportunities. Again, to help customers to be the most competitive in today's market, ACCs must balance the occupational outlook data with a daily review of the regional job boards so that they know the types of positions, numbers of opening and hiring requirements.

- Local and personal factors matter. Even within a region, an individual may have a more narrow area in which they are able or willing to work because personal commitments, commute times, lack of a dependable car or other factors. An ACC must help a customer prioritize and make educated and informed decisions about their education and occupational goals. Academic and Career Counselors must know the outlook data and the regional job availability information, but just as importantly, they must also know their customer.

Growth vs. Replacement Needs

Job openings in a particular industry or occupation refer to the total number of openings. These openings can be due to growth in the field or people leaving the industry (replacement). It is important to understand the difference between job openings in terms of growth versus job openings in terms of replacement. For a particular industry the percentage of growth may be low but the replacement needs high, resulting in more significant job openings than one might expect.

Additionally, if an industry is large (healthcare) there might be a large number of projected job openings with only a modest growth percentage. Conversely, industries that employ fewer members of the workforce might be encountering a large period of growth (high percentage) but the number of jobs added appears insignificant compared to other industries.

Indiana Industry Projections

Understanding state employment trends and projections is important when helping customers make career and educational decisions. ACCs should be able to generate conversations with customers surrounding career choices and the likelihood of employment associated with those choices. State and regional labor market data play an integral role in ensuring customers are developing career and educational goals that are realistic. Below are the top 5 industries identified by Hoosiers by the Numbers that are expected to see an increase in job openings by 2018.

Industry	Growth Percentage	Total Job Increase by 2018
Services-Providing	11.7%	256,375
Education and Healthcare	8.4%	113,619
Professional and Business Services	22.5%	82,346
Ambulatory Healthcare Services	35%	39,699
Professional, Scientific, Technology	33.8%	33,159

www.hoosierdata.in.gov (2011)

ACTIVITY

Using occupational resources investigate some jobs associated with the above industries-record one job for each industry that has a "bright outlook" and a second job for each industry that would be of interest to WorkOne Customers.

Services-Providing

_____

_____

Education and Healthcare

_____

_____

Professional and Business Services

_____

_____

Ambulatory Healthcare Services

_____

_____

Professional, Scientific, Technology

_____

_____

Hoosier Hot 50

The *Hoosier Hot 50* website lists the top 50 fastest growing jobs in the state. The information provided in this site is very user friendly and provides specific occupational and labor market information for each job. The site also links the jobs to specific career clusters. These career clusters are the same ones found in Indiana Career Explorer and can help customers make connections between their inventory results and growing jobs in Indiana. In addition to occupational and labor market information, short video clips help users understand more about that job. If a customer is interested in a particular job, the site is crosswalked with Indiana Career Connect where by clicking "find available jobs now" the user will be brought to ICC for more specific job search.

While *Hoosier Hot 50* is a great resource to get customers involved in the process of understanding the labor market and empowering them to conduct research on their own, there are important considerations for ACCs. Out of the top 10 hottest jobs in Indiana (as of October 2011), 7 require a Bachelor's Degree or higher. While these jobs might be attainable for some WorkOne customers, the ACC must help the customer understand the long-term commitment such educational initiatives take and help customers explore career pathways and the steps needed to achieve that long-term career goal. If customers really want to pursue a career that requires higher education, the ACC should help them explore options, identify possible entry-level positions within that field of work and develop a career pathway toward the ultimate career goal.

Hoosier Hot 50 -Top 5 Jobs

Computer Software Engineer	• BA required
Management Analyst	• BA or higher plus work experience required
Physician and Surgeon	• Professional Degree required
Network Systems and Data Communications Analyst	• BA required
Registered Nurse	• Associates required

REFLECTION

John is very interested in becoming a Network Systems Analyst. He presents you with research showing that there are trainings available and it is a growing occupation. He has very high TABE scores and has his HS Diploma. However, John cannot go to school for 4 years straight to get his BA. He needs to begin work within the next year or risk foreclosure on his home.

What might your next step be with John?

_____

_____

_____

How would you help John stay motivated to achieve his long term career goal?

_____

_____

_____

What additional information or resources would you give John to help him achieve his long and short term educational and career goals?

_____

_____

_____

USING OCCUPATIONAL INFORMATION AND LABOR MARKET DATA IN ACADEMIC AND CAREER COUNSELING

Once ACCs have knowledge of how and where to access occupational and labor market information, they need to be skilled and proficient in interpreting and using the data with customers. The ACC should be able to not only provide and apply occupational information to each unique customer's situation, but they should also be coaching customers on accessing and using this information to make informed career and educational decisions.

Using Labor Market Data and Occupational Information to Set Goals

As the customers explore career goals, they will be integrating information about themselves with related labor market and occupational information. The integration of these two key components leads to more informed and realistic goals that follow the S.M.A.R.T. philosophy of goal setting. As the customers refine and clarify their goals, it is important that the ACC ensure that the goals are realistic in terms of possible employment opportunities, education/training requirements, and that the type of work aligns with the customer's skills, interests and values.

For more information on setting goals, please see the Goal Setting section of this manual.

The tool to record customer goals is the Academic and Career Plan (ACP). The ACP documents long and short-term goals and allows ACCs and customers to generate a series of action steps for each identified goal together. For example, if a customer's long-term career goal is to become a Registered Nurse, some short-term goals along that pathway might include entering an Associate's Degree program and obtaining a part-time job in the field for networking and exposure purposes. Within each of these short-term goals, occupational research must be done and continuously revisited to ensure the customer's goals are still realistic and attainable.

Once customers have identified clear career goals, the ACC can assist in identifying next steps toward developing a career plan and pathway to reach the goals.

Career Planning and Action Steps

After customers have gathered information about their skills, aptitudes and interests and made sure that their career goals are realistic in today's market, an ACC must help to develop a plan to effectively reach their articulated goals.

As an ACC guides customers through organizing and evaluating information, several questions can help facilitate conversations surrounding career choice:

- What skills are needed for this career?
- What skills does the customer already have that can be applied to this career (explore transferrable skills)?
- What steps has the customer taken already toward the chosen career path?
- Are there entry-level jobs that the customer is able to pursue right now that will help further his or her career in this field?
- What additional skills or training are needed before the customer can be competitive to enter (or advance in) this field?
- If additional skills are needed, can they be developed at the WorkOne center or does the customer need to explore training programs?
- If pursuing training, what pre-requisites must be met and what else must the customer put in place or do to be prepared for training (transportation, childcare, books/supplies)?
- What other challenges is this customer facing and will they impact the customer's success in his or her career?

It is vitally important to answer each question before customers move forward on a given career path, in order to avoid any possible "detours" due to lack of planning. Of course, challenges are not always predictable, so it is important for an ACC to counsel customers to remain flexible and plan for the unexpected.

Evaluating the Training Options with Customers

When considering training for customers, Academic and Career Counselors must consider many factors. ACCs should work closely with each customer to determine what training is actually required for the target occupation, where the training can be acquired, what the entrance requirements for the training program are, the length of the training, and the likelihood that the customer will be successful in that training. Training initiatives are always a step on the journey to the ultimate end goal, a career. In turn, all educational choices should be tied to that career goal and align with the occupational information and labor market research conducted.

Academic and Career Counselors should consider the following when working with customers about training:

- *Educational requirements are important when applying for a job.* Most people would love to be able to walk into a high-paid position in a growing occupational field that offers opportunities for professional development and stability. However, many of these jobs require both educational and experiential qualifications. What are the *actual* requirements of a customer's chosen career field and how can our customers obtain the experience level or training credentials necessary to meet them?

- *ACCs must use all occupational data linked with educational and training data from other sources.* It is important to consider what training is available in a given industry or occupation, credentials earned in the training, duration of the program and cost of the training. It is equally necessary that customers consider if there is an experience level needed to enter a given field in addition to the training. The quality of each given provider should also be explored. It is important that customers do not find themselves still under-qualified to enter a chosen field after completion of training because of additional requirements.

- *When evaluating the skills necessary for a given occupation, existing life and career skills must not be ignored*. Skills such as problem solving, customer service, time management, and basic computer use are all items unlikely to be found in a post-secondary training but are critical to customers' success. ACCs will likely have to direct customers to workshops for these skills, either through the WorkOne program or other means (such as local community services, lifelong learning programs, church groups, libraries, etc.).

- ACCs must consider the *customer's previous training success and motivation*. If a customer indicates difficulty sticking with a six-month certificate program, participation in a four-year Bachelor's Degree program may not be the most appropriate plan. Together the ACC and customer should work together to develop goals and action steps that are attainable and realistic.

Job search

Often, customers are able to transition directly into a job along the path to the career they envision. There are circumstances where customers are already qualified for lower-level positions in which they could advance in the future to the target occupation. ACCs should discuss this option with customers to begin applying for these jobs while pursuing they are further training.

Academic and Career Counselors should remember:

- It is important for customers and ACCs to continually explore the regional labor market to ensure that there are available employment opportunities in a specific field when the customer completes their training. Just because a job has great growth potential indicated in the data, doesn't mean there are positions now open regionally for customers.
- Know the community and region! It is important for Academic and Career Counselors to read the local job listings (print, online, job boards, on-site postings) every day to get a better feel for what types of jobs are available and which regional employers are hiring, how often, what positions and at what skill and experience levels.
- Develop an in-house network of and strong professional relationships amongst ACCs, education providers, Case Managers and BSRs to share information so that everyone can better assist their customers.
- ACCs should explore neighboring region's labor market data and trends. Customers often live on the borders of regions or are willing to travel to another region. An ACC must know how to access, interpret and apply regional information and policy when necessary.
- ACCs must balance available occupational and labor market data with "common knowledge".
- ACCs may be required to look at official projections. In addition, it will be important for them to keep current of regional news that official predictions will not capture. For example, an ACC should have an awareness of any large company that is moving into or away from the area that will have an effect on the local job market.
- An ACC must always use caution. It is important to remember how quickly data can change and how important it is to ensure all information is current and accurate. ACCs should not rely on outdated information or on scripted advising. It is possible that an ACC may get used to saying, "there's always a need for CNAs" and miss the fact that the workforce system actually overwhelmed the CNA job market by sending everyone to class for CNA class over the last decade. In these cases, there may not be as much need because the job market has been flooded. It is important to continually seek the most up to date facts to provide to customers in academic and career counseling sessions.

REFLECTION

What are the most important uses for occupational resources discussed? List five specific activities you can do each day, week or month in academic and career counseling to utilize the tools we have reviewed.

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2._____

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3._____

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4._____

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5._____

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The Role of Assessments in Academic and Career Counseling

Competencies: Communication, Teaching, Assessment, Technology, Evaluation

INTRODUCTION

Academic and Career Counselors rely on assessments to provide effective counseling, help focus customer efforts and develop goals and action plans. The Indiana Department of Workforce Development (IDWD) has approved three formal assessments for use in WorkOne Centers. They are WorkKeys, Indiana Career Explorer (ICE) and the Test of Adult Basic Education (TABE). These three assessments will allow ACCs to identify customers' workplace skills, career interests, abilities, and values, and to ascertain customers' basic skills in terms of a grade level equivalent. Each assessment provides a different perspective on the WorkOne customer and his or her abilities, capabilities, interests, values and skills. Together, these assessments will help the ACC and the customer to set Specific, Measurable, Attainable, Realistic, Tangible (S.M.A.R.T.) goals, gain a clear vision of possibilities, and achieve optimal success.

WorkKeys, Indiana Career Explorer and the TABE are all valid and reliable, and are the three primary assessments approved for use in WorkOne Centers.

Valid assessments are assessments that have been proven to measure what they intend to measure. Reliable assessments have been shown to provide the same results consistently. Because the assessments selected for use by IDWD have been proven to be valid and reliable, ACCs should have confidence that results accurately reflect customers' skill levels and other characteristics. (For instance, a TABE score could go up if a customer completes an adult education course, but should not change significantly from one test session to another otherwise).

REFLECTION

How can using valid and reliable assessments in the context of academic and career counseling enhance the services provided to customers? How can you effectively integrate using assessment results into the 3-I Integrated Process to academic and career counseling?

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WORKKEYS

Overview

Potential job candidates are evaluated using WorkKeys, a nationally recognized assessment system that provides objective and reliable information about workplace skill levels. WorkKeys is a workplace literacy skills assessment which measures "real world" skills that are critical to job success. These foundational skills are valuable for any occupation and at any level of education. Customers that meet the required skill levels can be referred to employers that use WorkKeys results in making hiring decisions. The system also offers workers the opportunity to acquire valid and quantifiable proof of their work-readiness (via the National Career Readiness Certificate, NCRC), which will increase a customer's marketability to potential employers.

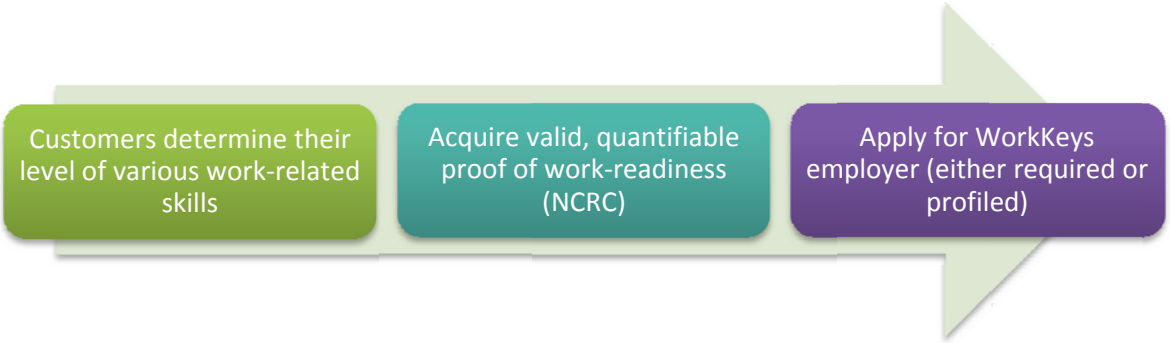
WorkKeys assessments are administered online and/or via paper and pencil in a secure, monitored testing environment to ensure the validity of test results. For more specific information on the administration of WorkKeys, staff should contact a manager or the WorkKeys specialist in the WorkOne Center.

WorkKeys is particularly useful in helping employers select, hire, train, develop and retain a high-performance workforce. Employers often experience difficulty finding and hiring people who have the foundational skills and aptitude that make them trainable for either a specific job or a broad spectrum of jobs. The costs of hiring, training, and retaining a workforce can significantly impact employers' bottom lines. In the current economic situation, it becomes imperative for employers to have a system that allows them to identify how prepared a potential employee is for a specific job.

WorkKeys assessments demonstrate to employers how well-prepared a customer is, and enables employers to select the most qualified customers for employment.

Purpose of WorkKeys

WorkKeys measures the foundational workplace literacy skills of individuals in three critical areas required by employers: communication, problem solving and interpersonal skills.



The WorkKeys system is a three-step process that includes Job Profiling, Assessments and Training.

- ***Job Profiling-***
  Job profiling offers employers a concrete way to identify the foundational skills needed to be successful in the workplace. For each position available, job profiling identifies the skills and WorkKeys skill levels necessary. By comparing job profile information with individual scores on WorkKeys tests, employers can make reliable decisions about hiring, training and workforce development.

- ***Assessments-***
  The ability to learn, listen, communicate, work in a team and problem-solve are important assets for any worker, regardless of career choice. WorkKeys assessments show what skills individuals possess and can help determine if candidates have the necessary skills for a given job and job profile. Employers also can utilize WorkKeys assessments to measure the foundational skill levels of their current employees to identify skill gaps and training needs. The assessments measure individuals' skills across a variety of areas. WorkKeys is most often used in the WorkOne Centers to assess the skill levels of individuals applying to specific employers.

- ***Training-***
  If an individual does not have the WorkKeys level(s) required by an employer, he/she should be referred to the Worldwide Interactive Network (WIN), an online remediation tool for WorkKeys. Individuals who score less than a three on reading or math should be referred to an Academic and Career Counselor for more individualized services to assist him/her in reaching employment goals.

A skill remediation program (Worldwide Interactive Network/WIN) should be used for customers that have 1-2 level deficiency on any given test. Customers with skill deficiencies larger than 2 levels should be encouraged to see an Academic and Career Counselor to explore additional educational options. Additionally, WIN can be used to pre-qualify customers *before* taking a WorkKeys assessment. Using WIN as a pre-qualification assessment can help ensure customers are well prepared and have an increased likelihood of achieving required WorkKeys level scores *prior* to testing.

Workplace Skills Assessment

Employers who utilize WorkKeys as a factor in making hiring decisions start by creating a comprehensive profile using extensive job task analysis for each of their open or projected positions. This involves not only an inventory of what tasks are necessary to perform the job, but also what skill levels are required to perform each task. WorkKeys does not verify job specific skills or take the place of an Occupational certification. WorkKeys can be used to determine if an individual has the workplace skills level and knowledge required to be successful in a specific position.

WorkKeys measures these abilities in 10 assessments that can be categorized into three key areas: Communication, Problem Solving and Interpersonal Skills. Any of the assessments can be completed in less than 1 hour.

There are 3 core WorkKeys assessments (Applied Math, Locating Information and Reading for Information) that are most widely used. These assessments can be combined to form a product that has received significant national recognition, the National Career Readiness Certification (NCRC). The NCRC is "a portable, evidence-based credential that measures essential workplace skills and is a reliable predictor of workplace success."[1] The following are assessments used to qualify for the NCRC. These assessments are available to all WorkOne customers who are interested in qualifying for the NCRC.

Applied Mathematics (AM)

(Problem Solving)

Assesses foundational workplace mathematical skills

Locating Information (LI)

(Problem Solving)

Assesses using information from diagrams, tables, forms, graphs, etc.

Reading for Information (RI)

(Communication)

Assesses the ability to comprehend work-related documents such as instructions, manuals, memos, or other instructions.

The following are assessments that can be taken in addition to those required by the NCRC only if they are required to apply for a WorkKeys employer. A WorkKeys employer may require a combination of these assessments in addition to the three mentioned above.

Applied Technology (AT)

(Problem Solving)

Assesses the ability to solve problems with machines or equipment found in the workplace.

Teamwork (TW)

(Interpersonal Skills)

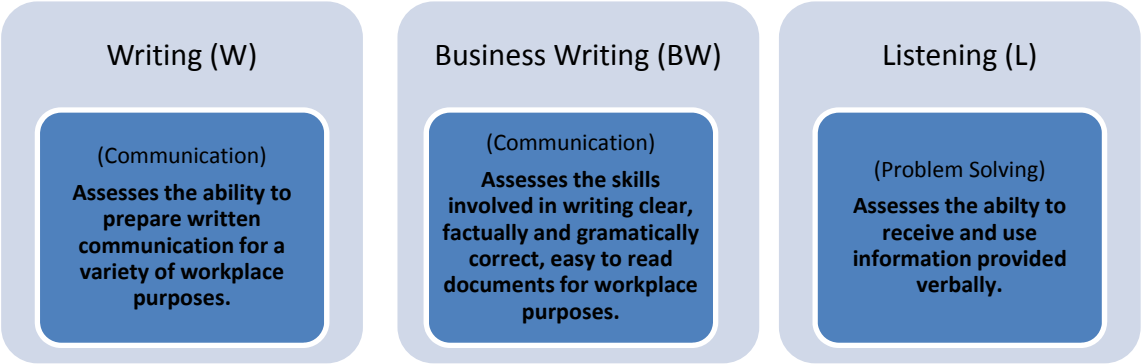
Assesses the skills involved in working in groups toward a common goal and accomplishing tasks together.

Workplace Observation (OB)

(Problem Solving)

Assesses skills in observing, following, understanding and evaluating processes, demonstrations or other on-the-job procedures.

[1] ACT, National Career Readiness Certificate: http://www.act.org/certificate/



These additional assessments should not be offered unless required for a specific employer.

Audience

WorkKeys is an appropriate assessment tool for:

- Any customer in the Job-to-Job track who is interested in qualifying for the National Career Readiness Certificate or is applying to a WorkKeys employer is eligible to take the appropriate assessment modules in WorkKeys.
- Customers in the Job-to-Job track who are unsure of their next steps or are interested in further career explorations should also be encouraged to use the assessments in Indiana Career Explorer (ICE).
- Customers in the Job-to-Job track who are interested or are identified through the WorkKeys assessment to need further training should also take the Test of Adult Basic Education.

How would an ACC's lack of knowledge regarding WorkKeys impact his/her Assessment Competency? What other competencies would suffer due to such a weakness?

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What steps could ACCs take to improve their knowledge of WorkKeys assessments?

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Interpreting WorkKeys Results

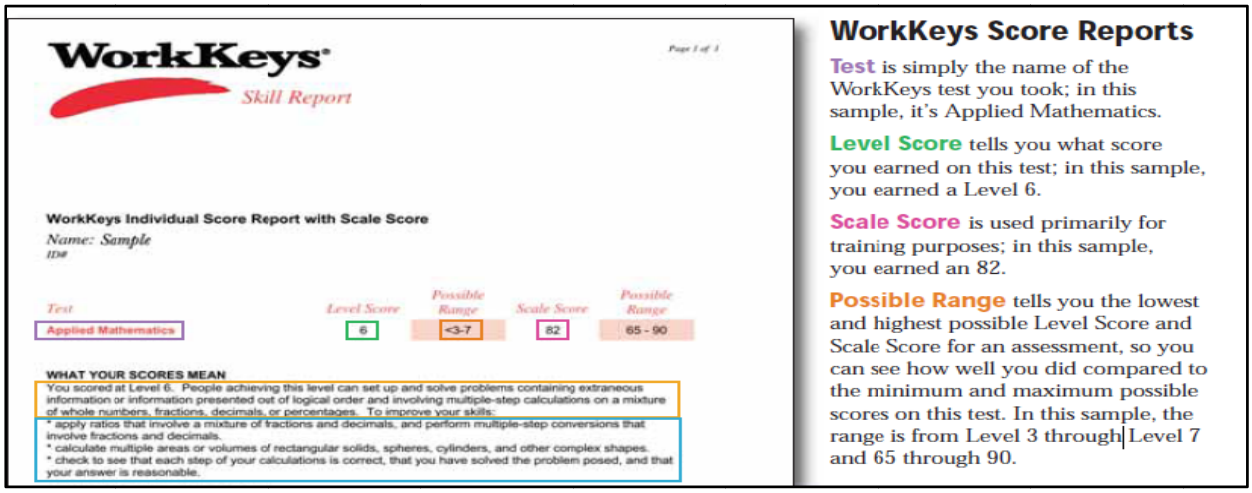
Academic and Career Counselors should assist customers to interpret their WorkKeys results. A key point to remember is that interpreting results is a collaborative effort between the ACC and the customer. Working with customers to uncover the meaning of their scores is an important step in encouraging the customer to take ownership and control of their future. Customers who are aware of their skills and what type of work they are ideally suited for, will gain confidence and self-awareness. They will also be able to make more appropriate decisions concerning their training or job-track.

The WorkKeys results list a *Level Score* and *Scale Score*. The *Level Scores* are usually used for job selection or promotions and are designed to be used with a job profiling process for employee selection. Level Scores consist of 4 or 5 broad score bands across the performance range. The *Scale Scores* are often used by educators and trainers to assess achievement and can be used to show growth over time, provide group comparisons in outcome measurements and show evidence of the Ability-To-Benefit. Scale Scores are not used for hiring or promotion decisions.

Test	*Level Score*	*Possible Range*	*Scale Score*	*Possible Range*
Applied Mathematics	5	<3-7	78	65 - 90

Questions in the test correspond to between 5 and 7 levels (depending on the test). The skill level is determined when a test-taker successfully answers questions at a given level, but not a level above. WorkKeys Score Reports identify the skill level(s) achieved and provide descriptive information about the abilities of the level scored. The meaning of the score and how it can be used should be explained to customers. If the score indicates that a customer might benefit from further education or career guidance, appropriate steps should be taken and the Academic and Career Plan (ACP) should be amended as necessary.

A finer gradient of scores than the 7 levels may be required. WorkKeys has developed a “scale score” which uses a 90-point scale system that can also be used when working to understand where within a given level the individual falls.



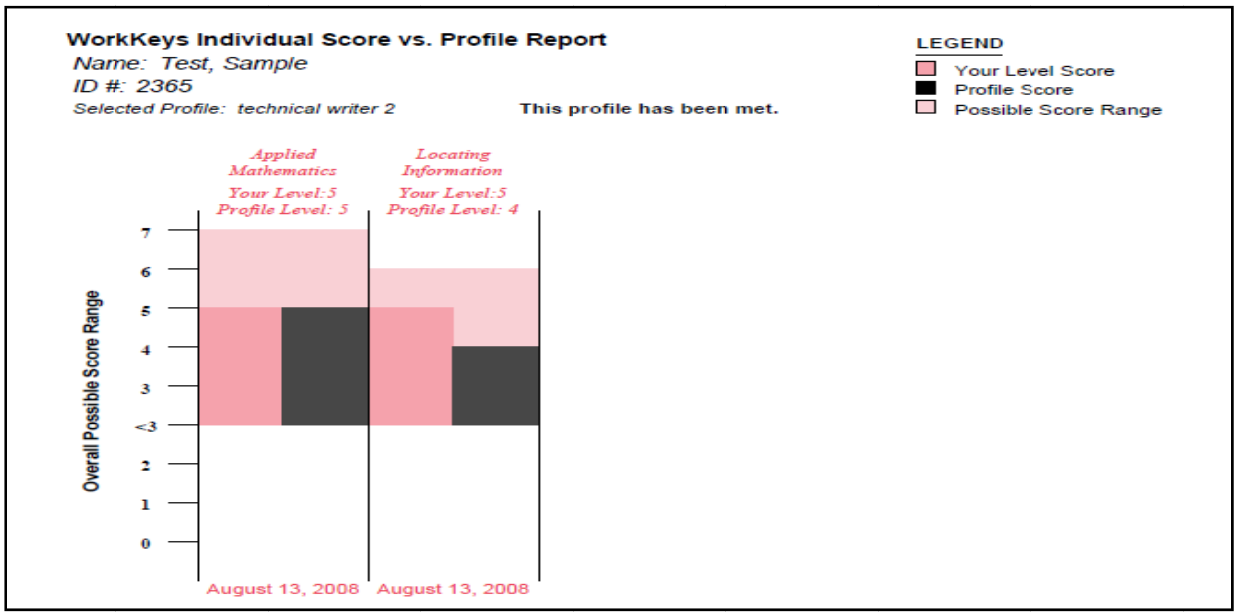
http://www.act.org/workkeys/careerseekers/pdf/UsingWorkKeysScores.pdf

The above sample score report shows where to find the customer's level score, scale score and an interpretation of the test results.

The Individual Score Report can be used in academic and career counseling sessions to discuss the customer's current skill level and possible career paths. It can also be used as a starting point to discuss training options that may be appropriate for customers to successfully reach their goals.

WorkKeys Individual Score vs. Profile Report

The following WorkKeys skill report should be used when a customer is using WorkKeys to qualify for a specific job opportunity with an employer who has a customized job profile in the WorkKeys database.



http://www.act.org/workkeys/assess/reports.html

This report compares the skills required by the particular job via the job profile to the skills of the customer according to the WorkKeys skill assessment they have taken. The report will detail the skill gaps between the customer and the job profile, as well as give information about whether the customer meets the skills necessary to qualify for the position as per the WorkKeys job profile.

If a customer has a small skill gap (1-2 levels), customers should be directed to use WIN (Worldwide Interactive Network) to fill that skill gap. Large skill gaps (2 levels or more) should result in a referral to Adult Education. Any score below a 3 in Applied Mathematics or Reading for Information should result in a referral to a literacy program.

National Career Readiness Certificate

As mentioned previously, WorkKeys links its results on three tests (Applied Mathematics, Locating Information and Reading for Information) to the National Career Readiness Certificate (NCRC), which, when obtained, certifies that a customer possesses essential workplace skills. To earn the certificate, a customer must take the three WorkKeys assessments. A customer's WorkKeys scores determine the level of certification that they are eligible to receive.

Below are the levels of NCRC certification available to customers[2]:

Bronze – scores at least a level 3 in each of the three core areas and has the necessary foundational skills for 35 percent of the jobs in the WorkKeys database.

Silver – scores at least a level 4 in each of the three core areas and has the necessary foundational skills for 65 percent of the jobs in the WorkKeys database.

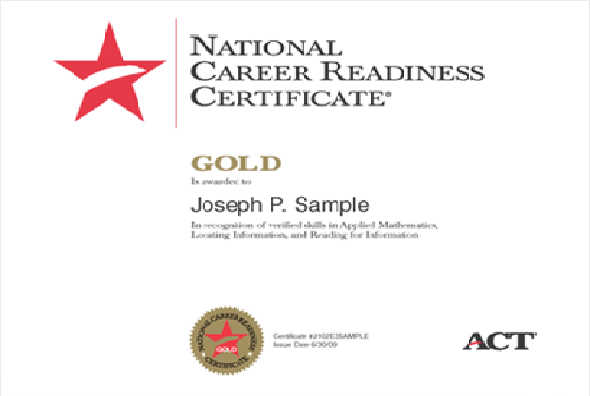
Gold – scores at least a level 5 in each of the three core areas and has the necessary foundational skills for 90 percent of the jobs in the WorkKeys database.

Platinum – scores at least a level 6 in each of the three core areas and has the necessary foundational skills for 99 percent of the jobs in the WorkKeys database.

[2]http://www.act.org/certificate/about.html

NCRC is a portable certification that has national recognition and is a reliable predictor of workplace success. The NCRC is recognized by some prominent businesses and is preferred by some employers in Indiana as a requirement for employment. In Indiana, most jobs that use the NCRC for qualification tend to be in the manufacturing, health care, and transportation/distribution/logistics industries.

For a list of WorkKeys businesses and employers in each region, staff should speak directly with a Business Service Representative.



Worldwide Interactive Network (WIN)

WIN provides the WorkKeys training components for WorkOne customers and replaces KeyTrain. The training includes individual lessons, each containing a pre-test, exercises and post-test, that teach the particular skills and abilities found in each WorkKeys assessment. The modules in WIN can be self-administered or facilitated.

Use of WIN should be targeted for customers in need of skills remediation and are close to scoring what is needed to qualify for a particular employer. In this case, the scale scores should be within 1-2 points of scoring what is required. If the discrepancy is any greater, the customer should be encouraged to explore other training options and be referred to an Academic and Career Counselor. Customers may choose, however, to work on WIN independently and decline the opportunity to work with an ACC.

SCENARIO

Sam is a 22-year-old high school graduate with no post-secondary education. He came into the WorkOne Center to complete WorkKeys testing for an employer he was interested in applying to. Sam's scores did not meet the employer's minimum qualifications for application and Sam was referred to an Academic and Career Counselor for additional guidance. Sam's scores were 3 levels below the employer's minimum requirements.

What are some next steps available to Sam? Which path would you recommend and why?

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Benefits and Limitations of WorkKeys Assessments

Customer Benefits

Obtaining the NCRC gives customers valid, quantifiable proof of work-readiness. WorkKeys is also used by profiled employers to qualify customers for specific positions and is thus often a necessary part of the application and hiring process. It can also provide customers information about where their skills may need improvement and direct the development of academic plans.

Academic and Career Counselor Benefits

WorkKeys benefits the WorkOne Academic and Career Counselors by providing guidance in developing the customers' career and training paths. WorkKeys can also help with goal setting by making sure that customers' career and training goals are realistic. If a customer scores exceptionally high or low in a particular section, the ACC will be able to help guide customer goal setting and planning towards appropriate ends. The assessment also gives Academic and Career Counselors quantifiable proof of customers' workplace aptitudes and allows them to job match more effectively. Although WorkKeys is primarily used for job-to-job track customers who work with Case Managers, it is beneficial for ACCs to understand the purpose, results and implications WorkKeys. Often, ACCs play the dual role of a Case Manager and an Academic and Career Counselor. In these instances knowledge of WorkKeys is required and extremely valuable.

Limitations of WorkKeys

As with any assessment, WorkKeys assessments should be delivered in as hospitable an environment as possible. Sufficient time, along with a quiet location in a well-lit and comfortable space is crucial. Even given the most optimal assessment conditions, WorkKeys has several limitations.

- *Computer Literacy* –If WorkKeys is administered online, customers who are not comfortable with using a computer may find the format difficult, which could in turn affect the assessment results. The customer's comfort level can be gauged by the initial WIN placement tests. If customers are unfamiliar or uncomfortable using a computer, they may find it helpful to attend basic computer literacy workshops prior to taking WorkKeys assessments, if available.

- *Test Anxiety* –Customers may have had negative experiences with testing and academic pursuits. For these customers, taking the WorkKeys assessment might produce anxiety, which in turn will affect their ability to perform. Coaching customers using positive and goal-oriented discussions is key to ensuring customers maximize their efforts. It will be helpful to review the WorkKeys test taking tips listed below before the customer takes the test.

WorkKeys Test Taking Tips

- There is no need to study or "cram" for the WorkKeys assessments
- Listen and read the directions for each test carefully
- Read each question carefully and be sure you understand what the question is asking
- Answer the easy questions first and use logic to answer the more difficult questions
- Budget your time wisely so that you are able to finish in the allotted amount of time
- Answer every question because there is not a penalty for guessing
- Review your work
- Take advantage of breaks to walk around, relax, clear your head and come back motivated to do your best in the next assessment

- *Language Limitations*–The WorkKeys system is delivered in English. Spanish versions are available if needed. If a customer speaks a language other than Spanish or English, WorkKeys may not be a helpful assessment.

- *Use in Context* –WorkKeys results should be considered a guide and used in context with other information in evaluating a customer's abilities. In most cases, the Case Manager or ACC should discuss results in terms of general ranges of capability or mastery and focus on the range of opportunities these results suggest. The WorkOne staff person can use the results to advise a customer on training options to strengthen skills and reach a higher level. The only exception is when WorkKeys is used as a test to achieve the NCRC; the scores do result in either achieving or not achieving the required level for certification.

Using WorkKeys Assessments in Academic and Career Counseling

The in-depth interpretation of WorkKeys assessment results can assist ACCs and customers to set goals that are S.M.A.R.T. (Specific, Measurable, Attainable, Realistic and Tangible). Goals should contain specific details and have benchmarks articulated clearly to measure success. Goals must be possible to achieve in a plausible amount of time. Effective goal setting involves developing concrete tasks and activities needed to achieve the goal. It is important that goals are documented so that customers can track progress and achievements. S.M.A.R.T. goals are essential to customer success because they provide customers with personal accountability and an action plan to work toward their aspirations.

WorkKeys results can be used during the goal setting process to help direct career interest. Using the customer's scores, the ACC and customer can research possible positions using the WorkKeys

Occupational Profiles. The Occupational Profiles can be searched online (http://profiles.keytrain.com/profile_search/) by job title, job cluster, job description, or by WorkKeys scores and matched with job titles in O*Net for further research. This occupational research can also be done through Indiana Career Explorer and WIN.

There will be occasions when customers are disappointed about their scores on a WorkKeys assessment and see the score as prohibitive to gaining a productive career. The searchable Occupational Profiles are a great way to show customers the occupations that they are qualified for, often related to the career path in which they are interested. Rather than focusing on what they are not qualified to do, ACCs should coach customers to develop career pathways which may involve training and career advancement. Using a Strengths-Based approach motivates and empowers customers, encouraging them to believe in themselves and to make realistic career decisions based on their strengths.

WorkKeys and the Academic and Career Plan (ACP)

As with all information regarding a customer's plan, the assessment information must be recorded in the Academic and Career Plan (ACP). The ACP has a section on Testing in which staff record results from tests and assessments administered to the customer.

The WorkKeys assessment results must be recorded under the *"WorkKeys"* section in the drop menu next to *"Form."* There are fields for the test scores in Reading for Information, Applied Mathematics and Locating Information WorkKeys assessments. Other WorkKeys scores should be recorded in the Notes section because there is not a specific field for each other assessment. List the name of assessment and score, each on a separate line within the Notes section. ACCs should also be sure to record the date that the WorkKeys assessment was taken. If staff members have any questions about recording WorkKeys scores in the ACP, they should contact a manager or supervisor.

Below is the format for the section of the ACP for WorkKeys data:

Work Keys

Assessment Date: mm/dd/yyyy
Form: Select One
Test Score: Reading for Information Applied Mathematics Locating Information
Does Customer Meet Minimum Qualifications for Profiled Job: Select One
Basic Skills Deficient: Select One
Notes:
[example]
Applied Technology – [score]
Listening – [score]

REFLECTION

How you do determine if a customer is basic skills deficient from WorkKeys scores? If you aren't sure what resources are available to you to help you find out?

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TEST OF ADULT BASIC EDUCATION (TABE)

Overview

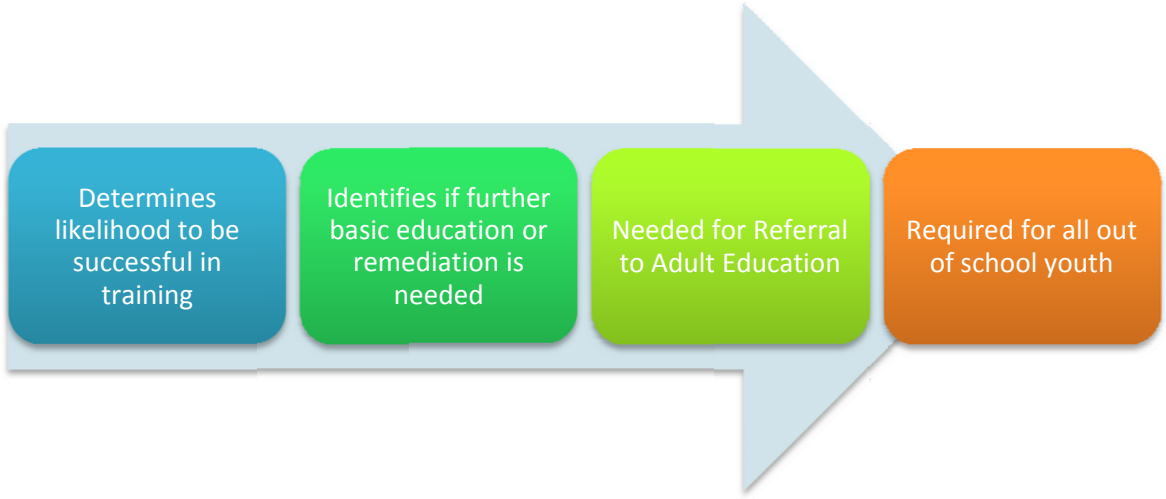
The Test of Adult Basic Education (TABE) is a clear and objective educational assessment. The TABE is the most common basic educational skills assessment used in the U.S. The TABE is intended to provide clear and accurate information about the educational level of WorkOne customers. The TABE assesses customers in Reading, Language and Math, including Math Computation and Applied Math.

The TABE is both easy to administer and score. It can be administered electronically or with paper and pencil. The TABE assessment is composed of 2 parts- a shorter locator test which will determine the correct level. The 2nd part of the assessment is composed of the Reading, Language and Math Sections. The locator helps determine the level test each customer should take. The possible levels are: Literacy (L), Easy (E), Medium (M), Difficult (D), and Advanced (A). The 2nd part of the assessment is slightly longer, proctored by staff and timed. TABE assessments provide a nationally recognized score that is both valid and reliable.

The TABE also has a separate test called the Complete Language Assessment System–English (TABE CLAS–E™). This assessment is meant for those who are not native speakers of English, and is closely aligned with the major English as a Second Language curricula and protocols. The TABE CLAS-E provides WorkOne with the resources needed to assess the reading, listening, writing and speaking skills of adult non-English language learners. Scores are linked to *TABE 9&10*, which helps ease students' transition into traditional adult education. It includes four Subject Areas of English Language Proficiency: Reading, Listening, Writing, Speaking.

Purpose of TABE

The purpose of the TABE assessment is to provide clear and accurate information about the customer's educational skills level. Understanding the educational level of customers helps determine whether they will benefit from a referral to the Adult Education system. It also can be used to gauge a customers' educational progress while they are in training.



Audience

Any customer pursuing Adult Education should be encouraged to take the TABE assessment. This may include customers with less than a High School Diploma/GED or those with an identified need for remediation. Out of school youth should also take the TABE assessment.
Customers interested in pursuing training (post-secondary or occupational education) should be encouraged to use the assessments included within Indiana Career Explorer, as well as the TABE assessment to further explore occupational options and possible career pathways.

There are several exceptions of customers who should not be required to take the TABE:

- Customers who can provide proof they have passed a valid and reliable entrance exam at a training provider and may enter credit-bearing courses with no developmental coursework needed.
- Customers entering On-The-Job Training.
- Customers who have proof they have a high school diploma or GED, provide a transcript and are determined by an ACC to have sufficient grades.
- Customers that have college credit, provide a transcript and are determined by ACC to have sufficient grades.

REFLECTION

TABE tests assess a customer's current educational level; however, many other factors can play a role in the outcome of a customer's TABE assessment results. What other factors might impact a customer's TABE results and what steps could an ACC take to help the customer overcome these factors to assist customers in achieving the highest TABE score possible?

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Interpreting TABE Results

A customer's TABE scores should always be interpreted in a one-on-one setting. The Academic and Career Counselor should be properly trained to convert the raw data to scores that can be used to provide guidance to customers.

The interpreted TABE score provides an approximate grade level for each subject in the assessment. The scores on the TABE assessment range from a scale of 0.0 to 12.9. The number in the score before the decimal point approximates the student's grade level, while the number after the decimal indicates the estimated number of months into that grade year (in a traditional nine-month school calendar). For example, a Reading score of 10.8 indicates that the customer reads at the level of someone eight months into the 10th grade.

TABE results must be presented in a confidential and private location as the customer may not want their scores shared with others. Customers are likely to be anxious about their scores. ACCs should always remember to reserve time and space for private TABE interpretation. It should be stressed during these sessions that the TABE results do not indicate a "good" or "bad" score, but provide a realistic skill level that can be used to focus attention and effort to address areas that may need improvement through training opportunities.

It may be necessary to have difficult conversations with a customer if they fail minimum TABE assessment scores required for a specific training. It is important to remember the following points when having these conversations.

- Use Constructive Confrontation
- Remain positive
- Use effective communication techniques
- Focus on long-term goals and immediate action steps

The TABE results are particularly useful to help ACCs identify a customer's training referral needs. A TABE score can be used to make a referral to Adult Education or qualify the customer for specific occupational training. Not all training providers provide an explicit Ability-to-Benefit score. It is quite common that ACCs must use discretion and professional opinions guided by regional policy to make appropriate recommendations regarding a customer's TABE scores and his/her ability to benefit from specific trainings. It is important that the ACC has information about the training requirements to make these determinations when necessary.

The interpreted TABE results are easy to understand. The challenge with relaying TABE results to customers lies in the sensitivity concerning perceived intelligence. It is vital to remind customers of the opportunity for success that lower than expected TABE scores can provide. By setting goals for TABE improvement, ACCs and customers are working toward creating customer pride, ownership and self-sufficiency.

SCENARIO

Jennifer is a 32-year-old high school graduate and is interested in going to occupational training for bookkeeping to get a certificate in QuickBooks. Jennifer scored a 9.2 in Math and a 10.3 in Reading on the TABE. The program that Jennifer is looking to go into does not have an explicit TABE Ability-to-Benefit threshold.

As Jennifer's ACC what would you recommend Jennifer's next step be and why?

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_____

If the provider required minimum TABE scores of 11.0 in both Reading and Math, how would you approach Jennifer with the news? Using constructive confrontation techniques, explain how you would tell Jennifer that she needs to attend Adult Education to improve her TABE scores before benefiting from the bookkeeping training?

_____

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Benefits and Limitations of TABE

Customer Benefits

The TABE benefits WorkOne customers by providing them with an accurate means to assess their current educational skill levels to meet the requirements of specific industries or employment opportunities. It can help determine whether they may benefit from Adult Education to boost their skills and literacy to meet the training or workplace demands. The TABE assessment also may qualify customers to pursue academic or educational opportunities which will allow them to expand their career opportunities. Training providers may have minimum TABE qualifications for admittance to ensure they have the skills necessary to be successful in the training. A customer and Academic and Career Counselor can create a realistic and attainable Academic and Career Plan by properly using the TABE assessment results.

Academic and Career Counselor Benefits

The TABE assessment provides valuable insight for an ACC to identify appropriate training opportunities for individual customers and to assess if they have the proper educational skill levels to qualify for specific educational and employment opportunities. Academic and Career Counselors can use a customer's TABE scores as a basis to make referrals to Adult Education and occupational training. TABE scores allow ACCs to understand a customer's academic abilities and to be able to have frank discussions regarding a customer's likelihood of succeeding in any given training or education program.

The TABE serves as an *Ability- to-Benefit* assessment that will help to guide the customer into training that meets his or her education level. In order to enroll individuals in certain training programs, they must meet a specific score on TABE to qualify for the training and maximize the probability of success. The Ability-to-Benefit concept is an important one that will assist ACCs in providing the most appropriate information to customers. It allows ACCs and customers to set realistic goals and to pursue training programs that will set up customers for success. ACCs would be doing customers a disservice by sending them to a training for which they don't have the appropriate skills. Instead, TABE results can be used as a sign that remedial education may be necessary before customers can continue toward their ultimate career goals.

Limitations of TABE

- *Academic Based* –TABE lacks the "real world" situations and application of the WorkKeys assessment. It can be viewed by some customers as "just another test" and not taken seriously. It is important for ACCs to make a diligent effort to make the assessment a positive experience for customers. Be sure to relate this assessment to the customer's goals and use the assessment to help the customer determine appropriate follow-up action steps.

- *Lack of Attached Ongoing Training Component* –TABE does not have a training component attached to the assessment, like WIN. The ACC should work closely with the customer and Adult Education team/agency to ensure any areas or skills identified as needing improvement are addressed through a well-planned Adult Education curriculum.

- *Test Anxiety*–Often customers have had negative experiences with standardized testing. Taking the TABE assessment is likely to produce feelings of anxiety for these customers which will affect the customer's scores. It is important that the TABE is not presented as a "test" that the customer must pass with a certain level or score, but a form of assessment to help determine what services he or she needs. It is also helpful to ensure that the test taking environment is optimal for concentration. The environment should be quiet, comfortable and well lit with limited interruptions.

Using TABE Assessments in Academic and Career Counseling

TABE results can also be used to guide customers' goal setting. Working with customers to set S.M.A.R.T. goals is one of the most important and challenging aspects of our job. TABE results provide reliable and valid information concerning customers' educational skills levels.

If a customer scores below a 5th grade level, an ACC should refer the customer to a literacy organization, where available. If the customer scores at a 5th grade level or higher, an ACC should refer the customer to an Adult Education program so that they may practice the skills needed to earn a higher level. Receiving a low score, as discussed earlier, can be very frustrating and upsetting to customers. ACCs should take the opportunity to goal set using these scores and work with customers so that they can view the situation as a positive learning experience instead of a roadblock to success. Setting a realistic goal for scoring at a specific level within a determined amount of time, will motivate the customer to work diligently and will provide a framework for a tangible success.

Customers that score below the minimum level required for a specific training can also make use of the S.M.A.R.T. goal setting technique. Again, setting a realistic goal for a specific level of competency to be achieved on a determined date will encourage the customer to take ownership of their education and progress. Working with the customers to realize their potential and working through the temporary hurdle of a low score will demonstrate the ACC's commitment to their success.

S.M.A.R.T. goals are not just for those customers who need improvement. Customers that have scored sufficient levels for admittance into training programs or educational opportunities can also benefit from setting goals based on their TABE results. For example, based on a customer's score, the ACC and customer can review available training programs that the customer is eligible for and set goals for entering and completing a particular training program. Also, customers may wish to achieve a higher score on a future TABE test even if they have scored sufficiently to enter training. Setting a goal for this will encourage self-esteem, success and positive goal-seeking behavior.

TABE and the Academic and Career Plan (ACP)

The Academic and Career Plan is a vital part of providing and documenting services to customers. It allows all WorkOne staff assisting customers to see what goals they have been working towards. Updating and maintaining the ACP is important to ensuring customers' success.

The ACP has several sections for recording of the results of multiple TABE test administrations. When recording the TABE results, users must select the *"Test Code"* (pre-test, post-test, or locator), *"Series"* (9 or 10), and *"Level"* (A, D, M, E, or L). All of this information is located on the TABE itself. If staff has any questions or are unclear about the TABE test, they should ask their manager for clarity.

The ACP also has fields for the ACC or test proctoring staff to enter the customer's *Raw, Scaled* and *Grade Equivalent Scores*, as well as a *Notes* section where they may enter any pertinent information related to the customer's TABE.

Below is the format for several TABE sections of the ACP:

TABE 1

Assessment Date: mm/dd/yyyy
Test Code: Select One
Series: Select One
Level: Select One
Test Score – Raw: Reading Applied Math Math Computation Language (optional)
Test Score – Scaled: Reading Applied Math Math Computation Language (optional)
Test Score – Grade Equivalent: Reading Applied Math Math Computation Language (optional)
Notes:

TABE 2

Assessment Date: mm/dd/yyyy
Test Code: Select One
Series: Select One
Level: Select One
Test Score – Raw: Reading Applied Math Math Computation Language (optional)
Test Score – Scaled: Reading Applied Math Math Computation Language (optional)
Test Score – Grade Equivalent: Reading Applied Math Math Computation Language (optional)
Notes:

(repeats for TABE 3 and TABE 4)

Additionally, the ACP has space for additional TABE tests including the TABE CLAS-E for adult non-English language learners (as described above). Below is the format for these sections of the ACP. Like the regular TABE, staff must record the *Test Code, Level* and *Form* of the test along with the *Raw, Scaled* and *Grade Level Equivalent* score results.

TABE CLAS-E 1

Assessment Date: mm/dd/yyyy
Test Code: Select One
Level/Form:
Test Score – Raw: Reading Listening Writing Speaking
Test Score – Scaled: Reading Listening Writing Speaking
Test Score – Grade Equivalent: Reading Listening Writing Speaking
Notes:

TABE CLAS-E 2

Assessment Date: mm/dd/yyyy
Test Code: Select One
Level/Form:
Test Score – Raw: Reading Listening Writing Speaking
Test Score – Scaled: Reading Listening Writing Speaking
Test Score – Grade Equivalent: Reading Listening Writing Speaking
Notes:

SCENARIO

Shawn is 24 years old and does not have his high school diploma. Shawn had met with his Case Manager and the following long-term employment goal was established:

Employment Goal: I will gain employment as an E.M.T. within the next 6 months.

Shawn researched E.M.T. courses on INTraining and is excited that there are a number of E.M.T. courses that that can be completed within 12 weeks. Shawn's Case Manager scheduled him to take the TABE test and made an appointment with Sean to see an Academic and Career Counselor for more guidance.

Shawn's TABE results are a 10.7 in Math and an 11.2 Reading.

Using the above information and using the S.M.A.R.T. philosophy of goal setting, write 2 short term goals that would help Shawn achieve his employment goal.

Short Term Goal 1:

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_____

_____

Short Term Goal 2:

_____

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_____

In your professional opinion, is Shawn's employment goal of getting a job as an E.M.T. within 6 months realistic? Why or why not? If not, what time frame is more appropriate? What information did you use to help you make your decision?

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INDIANA CAREER EXPLORER (ICE)

Overview

Indiana Career Explorer (ICE) is a comprehensive, self-administered, internet-based system that provides tools to explore various careers, plan a career path or career change and develop an education plan. ICE was developed for the Indiana WorkOne system by Kuder, Inc. ICE can be used in academic and career counseling sessions to coach and guide customers to set realistic career and academic goals. The system guides users through an easy, intuitive, step-by-step process to assess their career interests, aptitudes and values using three assessments:

- Kuder Career Search with Person Match
- Kuder Skills Assessment
- Super's Work Values Inventory (revised)

Individuals can use ICE's assessment results to explore specific career opportunities by industry or job title. ICE assessments and career exploration tools provide customers reliable and effective career planning experiences. The system is tailored to the user's needs and goals by allowing him/her to save their results for future use.

ICE also crosswalks, or electronically links, to several other resources including O*Net, Indiana Career Connect, IN Training and other regional job search and education websites. This feature supports customers' ongoing access to information on real job opportunities available to them. It also promotes proactive goal setting and career path planning by providing real-time information about today's high-demand, high-growth jobs.

Indiana Career Explorer- Journey and Navigator

Indiana Career Explorer has been modified for the use of two distinct populations- *Journey* was created for adult customers (whether seeking training or a direct employment pathway) and *Navigator* was designed for middle school students, high school students and youth customers. Both versions have capabilities beyond assessments and can direct a user through all steps of educational and career exploration and development.

Journey- *Adult and Post-Secondary Users*

Step 1- Assessments

ICE provides comprehensive assessments on customers' career interests, aptitude and values.

Step 2- Occupations

ICE provides detailed job profiles including written testimonials of people in the job and videos of tasks performed by someone on the job. This allows customers to have an opportunity for mini job shadowing sessions. This can be especially helpful for customers who are looking to transfer skills to another job, find a job related to their experience or college major or simply start their career exploration. ICE Journey allows customers to search occupations and narrow a list that is right for them. Users are able to save their favorites for future review.

Step 3- Education and Financial Aid

Customers can align their career interests with the related educational requirements determining their future paths. They are able to use ICE to learn about Financial Aid Assistance and develop an effective comprehensive Academic and Career Plan.

Step 4- Job Search Tools

ICE provides tools to assist customers in all facets of their job search and provides a central location to store all necessary information. Planning and preparation are critical in career planning. Customers are able to create a resume, write a cover letter, collect references and update their interviewing skills within the ICE system.

Step 5- Jobs

Once a customer has explored his or her educational and occupational options, the logical last step is actually finding a job. ICE provides a number of ways to research employers and employment opportunities.

Navigator- *Middle School and High School Users; Youth Customers*

Step 1- Learn About Myself

Interests, skills and values assessments are available in developmentally appropriate versions to help users gather information on occupations for broad exploration.

Step 2-Explore Occupations

Students can explore occupations written on an easy to understand reading level. The system allows users to create and save a favorites list by clusters and pathways, assessment results and title/keyword search.

Step 3- Plan for Education

This section provides information on various options students have after high school: going directly to work, entering the military, entering on-the-job training or entering a school that offers a 2-year or 4-year degree. Users can easily create or update an education plan for high school and beyond, explore extended learning opportunities, post-secondary schools and financial aid information.

Step 4-Plan for Work (High School Students Only)

ICE can help prepare a user for job search by providing directional guidance on how to develop a resume, write a cover letter, collect references and other necessary job search activities.

Step 5- Find a Job (High School Students Only)

Users can learn how to find job openings, search for jobs on the Internet, research employers and create an electronic Portfolio (e-Portfolio). The e-Portfolio becomes the user's own web page of achievements and goals that may be shared online.

Step 6-My Portfolio

This provides a place for the user to store account information, assessment results, develop career goals, list activities and awards and store post-secondary schools of interest.

The Indiana Graduation Plan has been has been integrated into Navigator through the Indiana Career Explorer (ICE). This allows students to complete and manage their Graduation Plan electronically.

Additionally, the integration allows for both parents and counselors to approve and electronically sign off on the Plan. Indiana state law mandates students complete various career and course planning requirements starting in the 6th grade. Utilization of the Graduation Plan will fulfill those requirements.

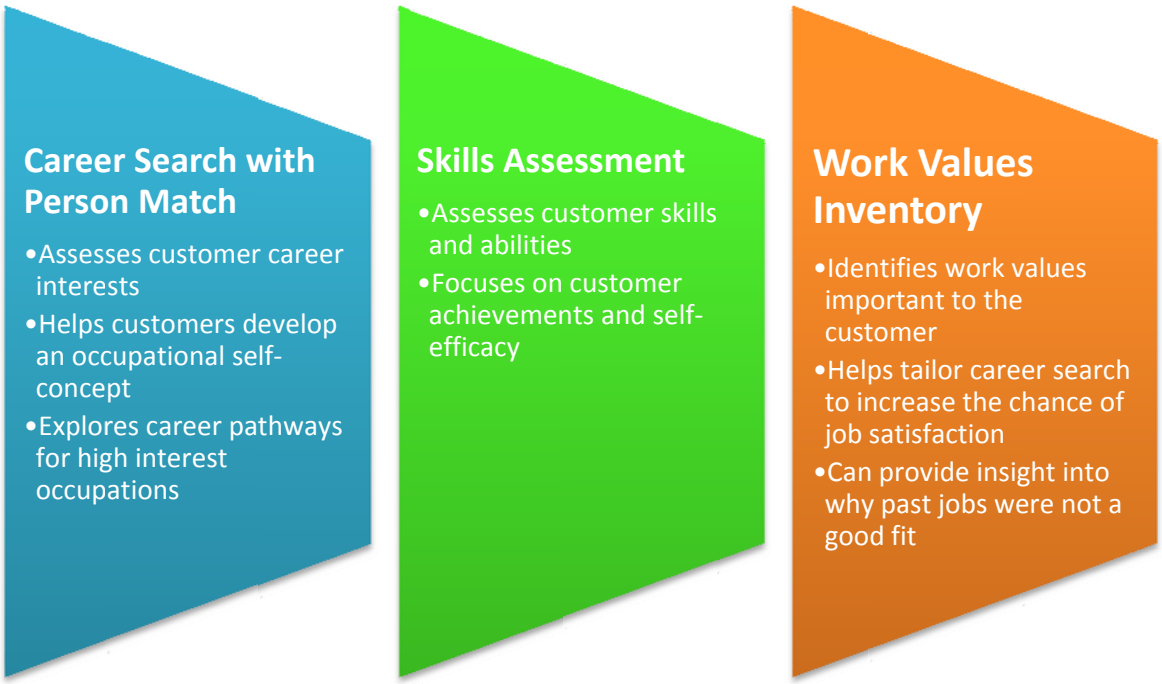
In addition, Indiana Career Explorer provides extensive administrative functions that allow staff to review and monitor customers' progress from assessments through subsequent steps in ICE.
During registration or through their Navigator profile, students can indicate that they are part of the JAG program. Administrators are then able to identify if students made an indication via ICE's *Administrative Database Management System*.

This provides valuable information to Academic and Career Counselors for meaningful, focused case management sessions. It also provides general information about the usage of WorkOne customers.

Career Interests, Skills and Values Assessments

Indiana Career Explorer provides assessments of Career Interests, Skills and Values. The career planning process for all individuals starts with learning about themselves. The three assessments provided by the ICE system are designed to focus career exploration efforts and ultimately encourage greater customer success and job satisfaction. All of these assessments are self-administered online. This format which eliminates administrative error and is available around the clock with instantaneous scoring from any location.

The Indiana Career Explorer three assessments include:



- ***Kuder Career Search with Person Match***

  This is an assessment of career interests. This assessment considers activities that a customer enjoys, which may include both job-related tasks and hobbies. The assessment links customers' career interest profiles and similar profiles of employed people in specific career clusters. Customers can then explore in more depth the careers of people with similar interest profiles to identify compatible career pathways.

  These assessment results will help the ACC more effectively coach the customer through their goal setting and career planning. The results also help customers develop an occupational self-concept. Customers will be able to explore their own career pathways for high interest occupations. The assessment results link directly with specific occupational profiles which allow the customers to effectively explore careers that relate directly to the occupations to which their interests are most closely matched.

- ***Kuder Skills Assessment***

  Career exploration and planning is often most effective when individuals are given the opportunity to assess their interests and activity preferences (as they do with the Kuder Career Search with Person Match) in combination with assessing their abilities and skills. The Kuder Skills Assessment provides customers the opportunity to evaluate their abilities and self-efficacy. The focus is on customer achievements and provides career pathways that promise success and satisfaction based on assessment results.

  It is important to note that this is a self-assessment of skills rather than a full skill test, so there is sometimes a gap between what a person can do proficiently and what they believe they can do. Fuller testing is sometimes needed to determine the customer's true ability. As with all tools, this assessment must be used in context with other scores, achievements and information about the customer.

  ICE is capable of reporting a comparison of the Kuder Career Search with Person Match Assessment and the Kuder Skills Assessment. This will give customers and ACCs further insight into appropriate occupational pathways, effectively developing successful career paths.

- ***Super's Work Values Inventory (revised)***

  This assessment measures the importance of work values relevant to career choice and development. Customers and ACCs can use these assessment results to tailor the career search to accommodate the values identified as most important which will in turn increase the chance of higher job satisfaction. This assessment can also provide insight into the reasons why past jobs were not a good fit for the customer and serve as a guide for making future career decisions.

Audience

Assessments are available online through the Indiana Career Explorer website[3] and can be used by all Hoosiers, 6th grade and older. The assessments can be included in core self-service for customers of the WorkOne Centers. Most customers will be able to interpret and use the results without WorkOne staff intervention. Customers who require extensive explanation and interpretation of ICE assessment results should speak directly with an Academic and Career Counselor.

The ICE system has benefits for any customer who seeks training or career guidance. Customers who are interested in career exploration services at the WorkOne Center (but not necessarily training) may take any combination of the assessments, but are not necessarily required to take all three. All

[3]http://www.indianacareerexplorer.com/

customers who wish to enter occupational training or post-secondary education *must* take all three components of ICE, prior to speaking to an Academic and Career Counselor.

Interpreting Indiana Career Explorer Results

Portfolio Summary

The assessments contained in ICE are most effective when a customer takes all three and looks at the results holistically. Though the top 3 career interests, skills areas and work values are recorded in the Academic and Career Plan, full results need to be accessed online to ensure comprehensive academic and career counseling. The online results can be accessed by using the region's (or personally assigned) ADMIN username and password. Once logged in, all assessments are accessed under the ADMINISTRATION tab. (If an ACC does not have ADMINISTRATIVE access, management should be contacted for assistance.)

The quickest way to access a complete view of a customer's ICE assessment results is to access his/her Portfolio Summary under the ADMINISTRATION tab. The Portfolio Summary provides the following information:

- Career Search with Person Match Cluster Rankings and Percentage Match
- Skills Assessment Cluster Rankings and Percentage Match
- Super's Work Values Inventory Rankings and Percentage Match
- Person Match Occupations (which are based on interests and recorded education levels)
- Customer Favorites
    - Clusters
    - Pathways
    - Occupations
    - Courses
    - Person Matches
    - Schools
    - Scholarships and Grants
- Customer Resume (if created)

REFLECTION

What type of information from the Portfolio Summary do you think you will find most beneficial and why? How will information on the aforementioned items improve your counseling sessions with WorkOne customers?

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After reviewing the customer's portfolio summary ,there are a few things ACCs should pay particular attention to addressing. While the Career Search with Person Match suggests options for what the customer might like to do in a career, the Skills Assessment assesses what the customer is good at and what skills they currently have. Examining these two assessments, the Academic and Career Counselor, along with the customer, can explore career pathways that would be the best fit for both what the customer enjoys doing as well as what the customer is skilled at doing. Sometimes, an evaluation of these two assessments confirms a customer's initial career intuition, while other times, high interest areas in the Portfolio Summary do not match the high skill areas. This is why Composite Reports within ICE are extremely informative and beneficial to Academic and Career Counselors.

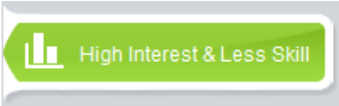
Composite Reports

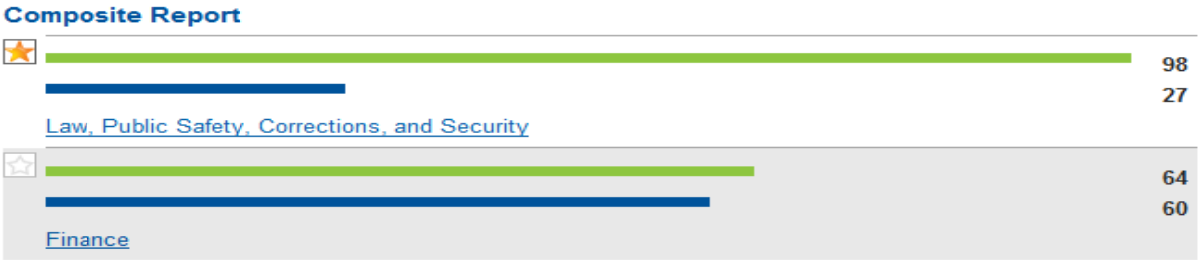
Composite reports are another way to view a customer's assessment results within Indiana Career Explorer. Accessed via the ADMINISTRATION tab, Composite reports offer a different view of a customer's Interest and Skill Assessment results and offer the following types of reports:

- *High Interest and Skill:* The clusters identified in these reports are clusters where the customer has self-identified skills and interest. ACCs should encourage customers to explore these career clusters and the information found here is often a great conversation starter during counseling sessions.
- *High Interest and Less Skill:* The clusters identified in these reports are clusters where the customer has identified high interest but not significant skills. Skills can often be developed in these clusters via education and experience and it is possible for these clusters to shape a customer's long term career goals. However, time constraints need to be considered and shorter term goals must be established either within the career cluster or outside of it that are realistic and attainable.
- *High Skill and Less Interest*: These are clusters where the customer has identified high skill but no interest. Conversations should be held with the customer to identify the reasons why a customer lacks interest in a high skill area. With time and experience our interests can change, and it is important for ACCs to acknowledge and explore this with their customers.
- *Low Interest and Skill:* These are clusters where the customer stated they had little interest or skill. If a customer verbally states interest in an occupation in a low interest, low skill cluster, the ACC should have a serious conversation with him/her to fully explore the contradiction and clarify the customer's career interests.

REFLECTION

Using the composite reports below, answer the questions provided.





Generate 3 open-ended high-gain questions you could ask this customer to further explore his/her results.

1._____

_____

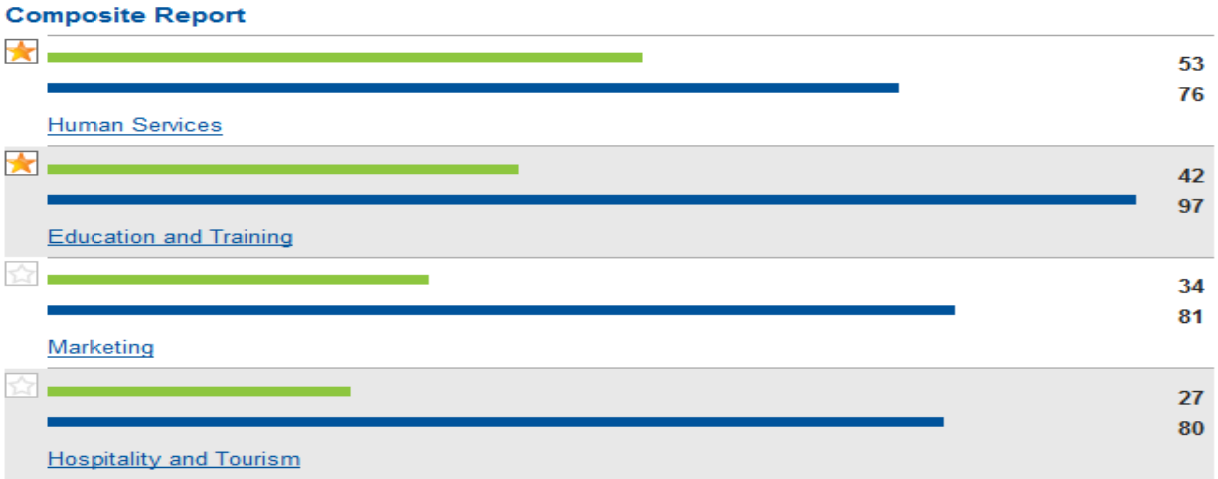
2._____

_____

3._____

_____

High Skill & Less Interest



Using the above composite report, generate some possible reasons why the customer (Kim) may have high skill but low interest in these fields.

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During your conversation with the Kim she tells you that she has no idea why her results showed she had low interest in the cluster of Education and Training and insists on continuing to obtain work in that industry. What additional information would be helpful to you as an ACC at this point in the counseling session? What would your next steps be with Kim?

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The Importance of Work Values

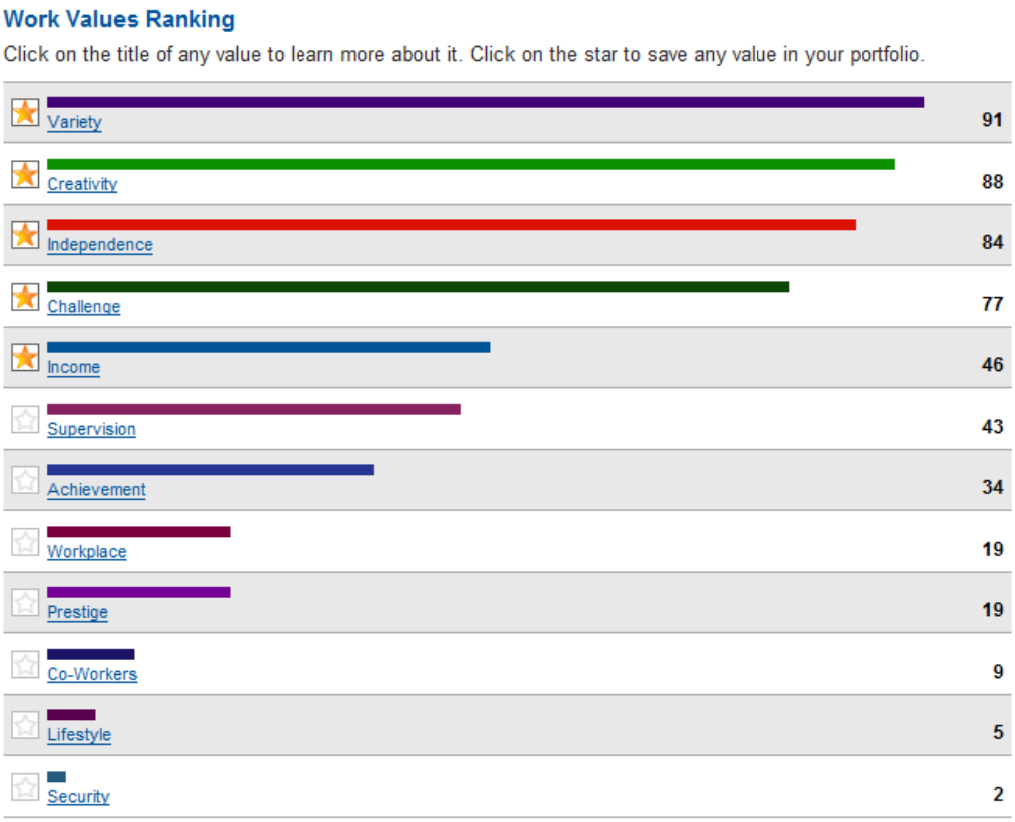
An important component of Indiana Career Explorer that unfortunately and frequently gets overshadowed by the Interest and Skills Assessments is the Work Values Assessment results. Super's Work Values are helpful in identifying what is most important to the customer in a career. These assessment results should be closely examined before choosing a career path. It is important that the customer's work values are taken into consideration because a customer is not likely to continue in an occupation where they are unhappy or unsatisfied. Customers will likely be most successful when their chosen occupation aligns with their values.

The Super's Work Values are also helpful in identifying why previous career choices may not have been successful. Taking the time to discuss values is important and must not be ignored. Some customers may be reluctant to discuss their values as they deem them irrelevant to their job search. However, the ACC is responsible for engaging the customer in their own job search and for helping the customer to make responsible, productive choices. Being aware of the values one ranks highly allows the customer and ACC to make appropriate goals and to pursue complementary professions.

Under the User Details page for the customer, an ACC can scroll to the bottom and view the Work Values results independently by clicking "View Report." From there the ACC can explore the customer's work values and view work values matches (which provide sample job titles and additional information on people who have similar work values to the customer.) Additionally, the "Related Occupations" tab allows the ACC and the customer to explore occupational opportunities that align with the customer's top 3 highest related values. After some narrowing of clusters, expected job growth and median annual salary expectations, ICE generates a list of potential occupations that align with that customers work values. This information can help ensure that a customer is making career and educational decisions that align with his/her work values, increasing the likelihood of workplace satisfaction and career longevity.

SCENARIO

The ACC pulled up Kim's Work Values Inventory results to see if employment in the field of Education and Training matched Kim's top three work values. Below is a sample of Kim's Work Values Results.



Based on Kim's Work Values results, do you think employment in the field of Education and Training would fulfill the Work Values most important to her? Why or why not?

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_____

Use ICE to do occupational research on the industry cluster for Education and Training. Identify 2 jobs that closely align with Kim's work values and 2 jobs that do not align with Kim's work values.

_____

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_____

Using ICE explore occupations associated with Kim's top 3 Work Values. What clusters tend to be associated with Variety, Creativity and Independence? List 6 additional possible occupations (within the identified clusters) that would be beneficial to explore when working with Kim.

_____

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Benefits and Limitations of Indiana Career Explorer

Customer Benefits

Because ICE is not a "test," customers may find it a more attractive and comfortable assessment than WorkKeys or the TABE. ICE benefits customers by providing accessible, practical and easy to understand assessment reports on their career interests, aptitude and values. This system can be very empowering for customers because it is self-administered and self-paced. Most customers are able to navigate the system on their own, explore career options and develop an informed career plan. ICE can reinforce intuitions customers have of their career interests and can also provide new insights for those who do not have a clear career goal or significant experience to draw upon for their decisions about careers and occupations.

ICE provides customers with the tools to create a resume, write a cover letter, collect references, update interviewing skills and seek financial aid information. ICE also can serve as an organizational tool for customers. The system can help customers create a unique URL, which hosts a portfolio for each user. In the portfolio, customers can store resumes, references and work samples to share with potential employers. These portfolios allow customers to keep all of their important job search information in one place and provides them with proactive control of their own job search.

Academic and Career Counselor Benefits

The assessments in ICE can serve as a valuable tool for Academic and Career Counselors. They can help in goal setting and directing both employment and academic endeavors. Academic and Career Counselors are able to easily use the ICE system to work in collaboration with customers.

When a customer registers for ICE, the ACC will be able to access the customer's profile and system activity through a centralized administrative database. The administrative database in ICE provides system alerts, resource files, links and access to tools. It allows WorkOne staff to access assessments, usage and education plan reports. Staff can check on the status of customers' progress and follow-through to hold customers accountable and reinforce positive information-seeking behavior. ACCs can also use the ICE system to post messages or information for customers.

A customer's ICE results are very revealing and can assist Academic and Career Counselors in developing actionable plans and S.M.A.R.T. goals. ACCs will have a very robust and multi-faceted view of a customer's interests, abilities, and values and will be able to work collaboratively with the customer using this information to set the customer up for a successful and rewarding career.

Limitations of Indiana Career Explorer

- *Self-Managed* –Because ICE is self-managed by the customer, it is possible that less motivated customers may not get the full value of ICE. Academic and Career Counselors must be diligent in using their administrative functions and following up with customers by using the results and system activity regularly in case management sessions.

- *Over-Reliance on Assessment Results* –It is important that customers do not base their entire career decision on the results of ICE assessments or on any one factor. Customers should use ICE to explore their various career options. The assessments should generate conversation with the ACC about possible career pathways. It is important for the ACC to use all available assessment tools and other information from direct interview and interactions to support customers in making informed career decisions.

- *Dissonance Between Customer and Assessment Results* –It is possible that a customer may not feel that the assessment results accurately reflect his or her interests or values. Rather than allowing a customer to completely dismiss the assessment results or ICE, the ACC should explore the results by asking open-ended questions. This should be an opportunity for the ACC to help the customer explore their feelings and create a career development plan that accurately reflects their interests and goals.

- *Computer Literacy* –Indiana Career Explorer is computer-based. If a customer is not comfortable using a computer, he or she may find the system slightly intimidating. It could be helpful to use ICE in a workshop setting, which will allow customers to become more comfortable using the computer and accessing ICE. If possible, staff can provide one-on-one assistance to help customers become familiar with the system and learn about the variety of ICE's capabilities.

Using ICE Assessments in Academic and Career Counseling

S.M.A.R.T. goals are the foundation of customer success. ICE results are a great tool for ACCs to begin to discuss and explore various professions with a customer. The results may suggest a position or industry that the customer has not considered up until this point. This is an ideal opportunity to discuss action plans and set specific, measurable, attainable, realistic and tangible goals to work towards the newly discovered career opportunity.

ICE and the Academic and Career Plan

The ICE results will be added to the Academic and Career Plan, just as with all other assessments. The ACC will select *"Indiana Career Explorer"* from the drop down menu under *"Form"* and record the results for each of the three ICE assessments (Career Search with Person Match, Skills Assessment, and Work Values) on the line for that assessment.

It is advisable to list the top three or four selections from each component of the ICE assessment in the notes section and to record the professions that the customer has identified interest in exploring. The ACP is a living document and must be updated regularly and completely in order to be a useful record. All assessment results will be kept in the ACP and can be referred to when needed.

Below is the format for the ACP section for Indiana Career Explorer.

Indiana Career Explorer

Assessment Date: mm/dd/yyyy

Kuder Career Search With Person Match:

Kuder Skills Assessment:

Kuder Work Values Inventory:

Notes:

Customers can and will read and interpret ICE assessment results on their own. However, staff should be able to help them if they have questions or need help in creating plans to follow up on ICE results. Additionally, features such as composite reports, work values exploration, and interest vs. skill discrepancies are great topics of exploration during counseling sessions that ACCs should take advantage of. Using ICE to its fullest potential will allow ACCs to provide more holistic counseling services to customers resulting in improved goal setting and goal attainment.

OTHER ASSESSMENTS AND THE ACADEMIC AND CAREER PLAN (ACP)

As noted above, IDWD has approved three assessments for use in the WorkOne system, the Test of Adult Basic Education (TABE), WorkKeys and Indiana Career Explorer (ICE) assessments. However, there are several other assessments that are used for specific purposes within the workforce and education systems.

These assessments should only be provided when a specific training institution or college requires them as part of the process of determining suitability for a training curriculum or for entry into a course of study. Since they are similar to TABE and WorkKeys in assessing basic skills, there is little other value to administering them.

IDWD has provided some basic information about these tests to familiarize staff with them since partner systems may require customers to take these tests. There are spaces for staff to record test results/scores from them in the ACP as a method of keeping track of the customer's progress in their training pathway.

COMPASS®

The COMPASS® computer-adaptive college placement test helps educators and workforce staff quickly evaluate incoming students' skill levels in Reading, Writing Skills, Writing Essay, Math and English as a Second Language. Assessment results allow the institution to place students in appropriate courses and connect them to the resources they need to achieve academic success. The COMPASS® is a relatively fast test to administer, can be customized to give cut-off scores and sync with placement requirements for training programs and is approved by the US Department of Education for determining eligibility for certain student aid funding. The COMPASS will be taken at Ivy Tech and policy should be followed regarding the implications of COMPASS results and other testing requirements.

The COMPASS® tests are:

- Reading
- Writing Skills
- Writing Essay (e-Write)
- Mathematics
- English as a Second Language (ESL)

In the Academic and Career Plan, the section for the COMPASS® is brief and straightforward. The format for recording COMPASS® results is shown below:

COMPASS ®
Test Date: mm/dd/yyyy
Scores: Reading Writing Math
Pass/Fail: Select One

ACCUPLACER®

Like COMPASS®, ACCUPLACER® is a suite of computer-adaptive placement tests that quickly, accurately, and efficiently assess reading, writing and math skills. Developed by the College Board, it is used by colleges to effectively recruit, advise and place students in the appropriate course or guide them to necessary developmental classes prior to college-level work. Because Accuplacer® is online, many students can be tested simultaneously with relative ease and efficiency.

In the Academic and Career Plan, the section for the Accuplacer® is straightforward. The format for recording Accuplacer® results is shown below:

Accuplacer ®
Test Date: mm/dd/yyyy
Scores: Reading Writing Math
Pass/Fail: Select One

Assessments play a large role in the academic and career counseling process. It is important that ACCs are able to accurately interpret assessment results and integrate this information to effectively support customers' long-term career goals and action plans.

REFLECTION
How can you integrate use of assessment results into the theoretical frameworks of career and academic counseling discussed in previous sections to be more effective in your role of Academic and Career Counselor?

_____
_____
_____
_____
_____
_____

Training Options

Competencies: Decision Making, Communication, Referral, Assessment, Technology, Research, Evaluation

INTRODUCTION

In today's job market, employers are requiring higher qualifications of applicants and current employees by demanding a High School Diploma or GED as a minimum prerequisite for employment. For many positions, there is an expectation of additional skills in the form of certifications or other objective industry recognized credentials. Many Indiana residents are in-need of both adult education and training to be able to compete in this current job market.

In Indiana, there are over 500,000 adults without a High School Diploma or a GED. In addition, approximately 20,000 high school students drop out each year. Hoosiers who do not have the proper qualifications required by employers are automatically disqualified for many positions before they even complete an application. It is part of the responsibility of an Academic and Career Counselor to identify customers that are in need of skill remediation and guide their education and training planning.

WorkOne customers have the opportunity to pursue training and education needed to reach their long-term occupational goals. In order to receive many of these services and access training, customers are required to meet with Academic and Career Counselors to discuss options, set goals and develop appropriate action steps.

Indiana Department of Workforce Development (IDWD) has concentrated efforts to the WorkOne Centers on increasing capacity for Adult Education and training programs, developing efficient methods of delivery, and creating programs that encourage employment and job retention as end goals. The object is to assist customers in developing a realistic and attainable career plan which includes skill attainment beyond a GED.

The desired result is creating a skilled and competitive workforce in Indiana. IDWD seeks to create a seamless system for education and training that supports successful customer results and strategically links education and workforce training to economic development.

Academic and Career Counselors (ACCs) are the major link between what IDWD is developing and the services customers are receiving. To this end, ACCs are responsible for being well versed in policy and processes for efficient educational enrollment. ACCs must be skilled in providing quality academic and career counseling services to customers and developing unique solutions for each individual to effectively meet his or her occupational goal. If ACCs are unsure of policy or expectations, they should contact their local manager for explanation and clarification, as all information shared with customers must be accurate and current.

Training Selection in Academic and Career Counseling

Training is a major step in achieving one's career goals. Academic and Career Counselors play an essential role in guiding the career development process and ensuring customers are making informed decisions in selecting the appropriate training. ACCs must work to create collaborative partnerships in which customers are actively participating in all steps of the decision making and career development process. This can only be achieved through providing effective coaching and guidance using expert opinions which integrate all possible data and information when customers are selecting appropriate trainings.

It is crucial to consider all relevant factors when making training referrals to ensure customers are selecting the training that is the right fit. This will ensure customers are successful and moving toward achieving their long-term career goals.
Factors to consider in training provider selection:

- ***Customer career goals***- all training should be action steps needed to achieve the ultimate goal of entry into a specific occupation

- ***Assessment results and interpretation-*** assessments include TABE, WorkKeys and Indiana Career Explorer

- ***Customer motivation, aptitude, life circumstances*** -ACCs must be sure to effectively develop a rapport to support customers and fully understand what training program would be the best fit for the individual's ultimate career goals

- ***Regional information about in-demand occupations***- all regions should have an "in-demand occupation" list that is updated annually. ACCs must be able to access the most up-to-date information when providing counseling

- ***Credentials offered***- all program credentials should be industry specific and a required prerequisite for obtaining employment.

- ***Length of Program*** - together the ACC and customer should carefully investigate each training program being considered, to ensure that the training has a reasonable timeline that is suitable for the individual's current life circumstance

- ***Cost of program*** - after thorough research, the ACC and customer should always opt for the provider who offers a quality training resulting in the required credential at the lowest cost for the shortest amount of time

REFLECTION

Create a list of some open-ended questions to ask a customer in order to understand his/her long term career goals.

_____

_____

_____

How would assessments like the TABE and ICE help you to guide a customer toward the right training provider?

_____

_____

_____

What are some of a customer's life circumstances that should be considered when selecting a training provider?

_____

_____

_____

What are three "in-demand occupations" in your region? If you are not sure, where can you find this information?

_____

_____

_____

TRAINING OPTIONS

Once a need for skill remediation is identified, customers have many training options available to them depending on their specific goals and needs.

Common training and educational opportunities include:

It is important that the Academic and Career Counselor work with each customer to develop an appropriate training plan. Customers have unique strengths, skills, resources, goals and needs that must be addressed in order to ensure that they are successful.

ACCs must assist in preparing customers to enter education or training. It is essential that customers have a clear understanding of what to expect from the training experience in order to properly prepare. ACCs should have information about training providers and programs to help customers prioritize action steps and arrange resources needed to be successful. It is important for ACCs to guide customers in discovering at what type of learning style they may have by using past records, assessments and asking open-ended questions to encourage self-exploration. ACCs can then coach customers to find the best placement to suit their style.

Adult Education
Overview

Adult Education offers customers basic skills remediation. This can be identified through the TABE assessment results, placement test scores or in the context of counseling sessions. Adult Education classes are designed to address customers' skills deficiencies and boost their basic skill level, which will in turn increase their employability and increase the likelihood of success if they choose to pursue further occupational training.

ADULT EDUCATION
•Address customers' needs for basic skills remediation •Assist customers in preparing to successfully earn a GED

Audience

Academic and Career Counselors are responsible for working with the customer to identify the need for Adult Education, make the customer aware of Adult Education programs that they qualify for and help the customer to create realistic goals for attending an Adult Education program.

ADULT EDUCATION AUDIENCE
•Without a high school diploma or GED •Have a high school diploma or GED but: •Scores at or above a 4th grade level and below 12.9 in any TABE test •Does not meet Ability to Benefit threshold for desired GED+ program •Self-identifies educational skill gap •Out of School Youth ages 16 and up

If a customer scores below a 5th grade level on the TABE, an ACC should refer the customer to a literacy organization, where available. If a customer scores at a 5th grade level or higher on the TABE, an ACC should refer the customer to an Adult Education program for remediation. Customers that score below an 8.9 grade level on the TABE assessment are considered Basic Skills Deficient. These customers should be strongly encouraged to enter Adult Education even if they have a High School Diploma or GED.

Customers who are able to meet the entry requirements should be encouraged to pursue a GED while attending occupational training in order to earn an additional qualification through the GED+ program. This will allow customers to efficiently and effectively work simultaneously toward their ultimate career goals. Employers are often looking for minimum qualifications beyond GED or High School Diploma. GED+ programs allow customers to gain both the basic skills (GED) through the Adult Education system and an entry level certification, through occupational training concurrently. Using this model, customers will be able to streamline their entry into a career and move quicker towards their goals in a limited amount of time. ACCs should stress in all counseling sessions that GED or High School Diploma attainment is often no longer enough to meet employers' expectations. Customers must strive to work toward required certification or licensure simultaneously.

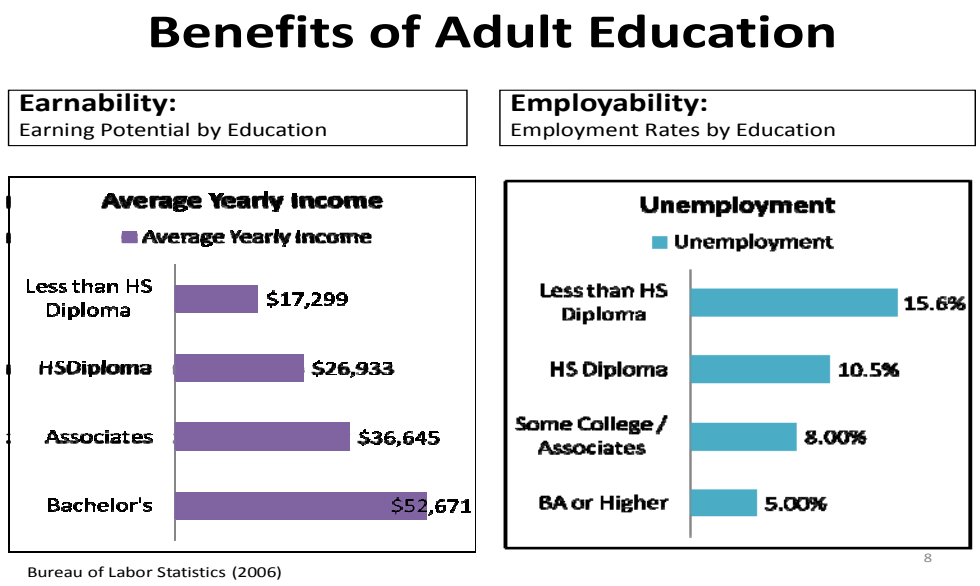
Customers that do not meet the minimum Ability to Benefit TABE requirement needed for a specific GED+ program should be encouraged to enter Adult Education in an effort to target skills that need remediation so they are able to enter this program. Sometimes there will not be a explicit Ability to Benefit score requirement. In these cases, the ACC can exercise their discretion and use their knowledge of the training requirements and the program demands to identify the need for skills remediation. Customers in need of skill remediation should pursue this through Adult Education prior to starting a post-secondary institution. The need for skill remediation is often determined by customers' results on TABE or a placement tests such as Accuplacer or COMPASS. Customers should be counseled by ACCs to avoid financial costs of paying for remedial or non-credit bearing courses at post secondary

institutions. They should instead be encouraged to seek these educational services through an Adult Education provider.

Benefits and Considerations

When working with customers who are lacking a High School Diploma/GED or secondary education, it is important to focus on creating goals that are specific, measurable, attainable, realistic, and tangible (this is a method called S.M.A.R.T. goal setting discussed at length in Goal Setting).

ACCs should point out the disparities in earnings between those with a high school or GED and those without when discussing Adult Education as a training option with customers.



Increased education relates directly to a customers' increased earning potential. The likelihood of becoming unemployed also dramatically decreases with an increase in educational credentials. Academic and Career Counselors are responsible for working with the customer to identify the need for Adult Education, make the customer aware of Adult Education programs that they qualify for and help the customer to create realistic goals for attending an Adult Education program.

It may be necessary to use effective communication and constructive confrontation techniques to inform them of employers' preferences for candidates that have formal education credentials such as, GED or High School Diploma.

REFLECTION:

What approach might you take when working with a customer who tested below a 5th grade level in reading on the TABE assessment, if the customer is resistant to following through with an Adult Education program?

_____

_____

_____

How might this approach differ for a customer *without* a High School Diploma or GED who scored very highly on the TABE assessment?

_____

_____

_____

Case Study

Jennifer is a 44-year-old woman with two children who are grown and independent. She was recently laid off from the office cleaning position in which she worked for the past 6 years. Before that, she was a stay-at-home mother. Jennifer says she enjoyed the office environment but would like to move to an office job on the administrative or clerical side. Jennifer believes that she would do well in such a position because of her strong interpersonal skills. She says she would feel more confident to do the job if she knew more about computers.

What training options might you explore with Jennifer? What assessments might you recommend Jennifer take?

_____

_____

_____

_____

Jennifer takes the ICE and seems to be a strong match for a clerical position in her Interests and Work Values. Her skills in the area are less of a match. She takes the TABE test and scores a 6.4 in reading and a 3.9 in math. Jennifer dropped out of high school in her senior year and has not been in school for 26 years.

Would Jennifer be a candidate for Adult Education classes? Why or why not? What other factors should be considered when providing academic and counseling services?

_____

_____

_____

Create a possible training plan for Jennifer that includes long term and short term goals and action steps.

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_____

_____

Academic and Career Counselors should guide customers to pursue education and training options beyond just that of Adult Education. Although this is often quite challenging for customers, it is also needed in order to effectively work toward the goal of self-sufficiency. ACCs must assist customers using the Strength-Based philosophy throughout the process. The focus must be to set goals with the shortest possible timeframes. Customers are at risk of not completing training if they are expected to be engaged for lengthy periods of time due to the competing demands of their resources, time and energy.

It is important that Academic and Career Counselors are able to guide customers who need to obtain their GED. Below is some basic information about the GED:

- GED tests provide adults who did not complete a formal high school program the opportunity to certify their attainment of high school level academic knowledge and skills.

- The GED indicates equivalency of high school level knowledge; it is not considered a High School Diploma.
- The GED Test battery consists of five parts, testing knowledge in these specific subject areas:
    1. Language Arts-Reading
    2. Language Arts- Writing (2-part test with a multiple choice section and an essay portion)
    3. Mathematics (2 part test, one of which permits the use of a calculator and one that does not)

4. Science
5. Social Studies

- The entire battery of GED tests will take a little over 7 hours, usually given over a period of two or more days. In Indiana, individuals must complete all sections within thirty-five days of taking the first test.
- In order to attain a GED, a minimum score for the complete battery of tests is 2250. Each section of the exam must have a minimum score of 410.
- Sections that were not passed with the minimum of 410 points can be retaken. Also, any section may be retaken in order to raise the average test score to the necessary average of 450 points to earn the required combined score of 2250.
- Tests may only be retaken two additional times in a calendar year (January 1 through December 31).
- The fee is set by each local testing center. The maximum fee a local center may charge is $70.
- Customers must register for the GED at a local testing center. Any questions or additional information can also be directed to the local testing center.
- More information about the GED is available through the Adult Education website- www.in.gov/dwd/adulted.htm

ACCs should be aware of programs' locations and specifics about the classes including capacity, duration, classroom dynamics, and workload expectation. The ACC resource binder should have detailed information about the Adult Education providers to share with customers. This up-to- date information can also be accessed through the Adult Ed website (www.in.gov/dwd/adulted.htm).

In order for customers to be successful in the Adult Education, it is necessary that they are properly prepared. Customers that have realistic expectations will perform better and are more successful when attending training. This is especially true of customers who may have anxiety about training or academic pursuits.

It is crucial for Academic and Career Counselors to have strong professional relationships with both the Case Management team and Adult Education instructors. This collaboration is essential for customers' success. The ACC must be informed of customers' progress through the Adult Education process. A collaborative partnership between the Case Manager and Academic and Career Counselor ensures continued contact with a customer providing the necessary support throughout the Adult Education and training initiatives. The Adult Education instructors must be aware of customers' long-term career goals so they can support these throughout the education experience. Customers should have a copy of their Academic and Career Plan (ACP) to maintain focus on their long-term goals and share their ACP with the Adult Education provider so that the provider may give the extra support needed.

REFLECTION

How does a strong relationship between an ACC and Case Manager benefit the customer?

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_____

_____

How do strong relationships between an ACC and Adult Education Instructors/Institutions benefit the customer?

_____

_____

_____

Time is the enemy of the adult learner.

Special emphasis must be placed on urgency and moving customers through the process quickly. This is especially true of the Adult Education student. ACCs must aim to support a customer throughout the education and training process. There is a high risk of customers leaving training because of competing demands, responsibilities and life circumstances. In some cases, it may be advantageous to assist a customer on a "fast track" using outside tools to help boost learning. It is expected that an ACC will assist customers to make bigger educational gains in shorter amounts of time. An ACC must work with customers to keep them motivated and on track to accomplish educational short-term goals and achieve long-term career goals. This is crucial for an adult learner. Seeing progress will help foster a sense of continued motivation and commitment in customers.

CASE STUDY

Kathy is a 22-year-old WorkOne customer who dropped out of high school in the 11th grade when she became pregnant. Kathy got good grades while in school, often making the honor roll, but she has not pursued her GED since dropping out. One of Kathy's friends recently was promoted to an assistant manager position at the local supermarket and told Kathy that she could get her a job there. A diploma or GED is one of the hiring requirements at the store and while Kathy's friend says she can help her get a job there, she says there is no way around that requirement. Kathy wants to get her GED as quickly as possible to be able to start work.

What would be your first step in helping Kathy earn her GED?

_____

_____

_____

What can you do to expedite the process for Kathy and help her to start work as soon as possible?

_____

_____

_____

Lay out a realistic timeline of the steps Kathy will take to reach her goals.

_____

_____

_____

_____

_____

It is important for Academic and Career Counselors to always connect education and learning activities to the customer's ultimate career goal. In order for the customer to stay motivated, they must have contextualized information about how the training is relevant to their lives. ACCs must strive to convey how the education will directly benefit the customer.

Customers' ultimate goals should always be to enter their chosen career fields. Adult Education and any subsequent training are steps that must be taken to achieve this goal. It is essential that the customer remains connected with WorkOne services throughout Adult Education. An ACC's aim is to keep customers engaged beyond enrolling and completing Adult Education. It is to keep customers active in working to achieve the goals established in ACP.

REFLECTION

What are some things an ACC can do to keep a customer engaged throughout the entire process of gaining the education and skills to meet their career goals?

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GED+ Programs

Overview

Increasing employer expectations bring the need for a comprehensive service delivery model into sharp focus. To respond to this need, Indiana created the GED+ program, a training framework to explicitly respond to employers needs for a skilled workforce.

GED +
•A unique program that combines occupational training with the pursuit of a GED •The opportunity to offer customers a first step on the career ladder in an in-demand industry •Fast track to a career •Allows customers to bridge basic and contextual knowledge to work towards nationally recognized occupational certificatations

The GED+ program offers a choice of 15 career certifications covering everything from the medical field to information technology. The pathways were chosen because they are entry-level and can be completed in a relatively short amount of time. The GED+ programs ideally would last no longer than 14 weeks and focus on preparing the student to learn skills necessary to pass an occupationally specific certification. Internships are only completed if it is required by the specific certification. The Certified Nurses' Assistant (CNA) program would be an example of this. The use of job shadowing and other similar opportunities with employers is strongly encouraged to further the customers' knowledge base and employability prospects.

GED+ programs allow customers to bridge basic and specific skills needed to enter a chosen occupational field. Emphasis is placed on contextualized accelerated curriculum which leads to earning nationally recognized certifications. The GED+ program is a flexible and adaptable model designed to meet local and regional workforce demands. The GED+ programs focus on industries that are most in-demand and have shown the highest growth in a given region. The programs offered will vary regionally so it is important for ACCs to have comprehensive knowledge of the programs in their area and understand the process for accessing the needed information from other regions. This information should be kept handy and up-to-date using the resource binder. In addition, ACCs must also be able to efficiently and effectively research other regions' GED+ programs when necessary.

The most common and fastest growing industries included in the GED+ programs are:

- Healthcare
- Information Technology
- Business Administration and Support
- Advanced Manufacturing
- Transportation and Logistics

There is an example of a sample CNA career pathway and the GED+ Program framework in the appendix for reference.

REFLECTION

How can using career pathways help an ACC facilitate the goal setting process more effectively?

_____

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_____

_____

Audience

There is a need for many customers to simultaneously work towards a GED and a needed career certification. Customers often feel a sense of urgency to enter their chosen career, use newly acquired knowledge in a practical real world situations and earn money to support themselves and their families. GED+ programs work to allow a customer to build their capacity in the shortest amount of time possible by allowing customers to enter Adult Education while concurrently attending training to earn a certification to enter a specific career field.

GED+ AUDIENCE
•No GED and meets minimum TABE requirements •GED/High School Diploma but needs skill remediation •Interested in Occupational Training

The target audience for this program is customers without a High School Diploma or GED that meet Ability to Benefit TABE scores required by the certification or training program. To enter any of these programs, customers should score at least an 8.9 grade level on the TABE test. In many cases, the TABE requirements may be higher for the desired occupational training provider. The occupational training programs focus on giving customers the skills and credentials needed for entry-level positions and provide the first step in the career ladder while they are pursuing a GED.

Benefits and Considerations

Academic and Career Counselors must work with customers to bridge the gap between training and careers. Often times a customer may enroll and complete a training program without having goals for *after* the training. Many customers view enrollment in a training or education program to be a large enough goal for their circumstances and fail to connect the training to future career plans. The concept of GED+ is a structure that connects Adult Education programs, occupational training programs, and

often post-secondary institutions with steps which are sometimes called a career “ladder” or “lattice” so that a customer is always actively working towards the next step.

Many people have historically spoken of “career ladders” but in the past decade, experts have realized that “ladder” suggests one path, one set of rungs following immediately upon another. Thus “lattice” became a common term. Today, “Career Pathway” is most clear as it describes a process that may have multiple entry and exit points for the customer, as well as branching paths that can be used in different circumstances to help the customer get to their longer-term goal. Often the pathway is a combination of several educational steps along with activities that build work experience, including periods or steps of employment.

GED+ programs establish a progression of training programs within a given occupation focusing on earning stackable credentials that are objective industry-recognized standards. The GED+ program focuses on long-term solutions with short-term objectives. This means that each step in the education and training process, as well as interim-step employment engagements, internships, etc, prepares students for the next level of work and education through contextualized learning and concurrent training. Students achieve industry recognized credentials through taking and passing a standardized skill assessment at the completion of each step in the pathway. Each credential within a given occupational pathway builds on the previous credential. This creates more career and earning opportunities for students who work through a career pathway.

CASE STUDY

Tony, a 34-year-old WorkOne customer, is interested in changing careers. After working the past 15 years in landscaping, he has developed back pain that makes the job very difficult. Tony has always been interested in technology and he says he is “a natural with computers.” Although he does not have any formal computer training, friends and family always seem to call him when they have a new computer to set up or have computer issues.

Tony does not have his diploma. He attempted to get his GED several years back, but he failed the essay and science sections and grew discouraged. He did not retake either GED section.

What would a realistic career goal be for Tony and what steps can Tony take to reach his goal?

_____

_____

_____

_____

_____

Would Tony be a good candidate for the GED+ program? Why or why not? If yes, how could Tony work towards obtaining a Career Certification and a GED simultaneously?

_____

_____

_____

_____

_____

_____

What are some criteria that an ACC should consider when referring a customer to a GED+ program?

_____

_____

_____

Benefits of GED+ Programs
•Accelerated path to achieve career goal •Contextualized learning in Adult Education •Low cost educational option to customer

The benefits of the GED+ programs should be highlighted and discussed at length during counseling sessions and throughout the development of the Academic and Career Plans (ACP). Customers should be creating a plan to not only qualify for an entry-level job, but also looking toward opportunities for professional growth which would ultimately lead to self-sufficiency. There should be a concentration on what action steps are needed to grow professionally in the career the customer has chosen.

REFLECTION

How can using the “lattice” idea to career planning empower the customer more than the “ladder” approach?

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_____

_____

How does a short-term training through a GED+ program help to motivate and focus a customer?

_____

_____

_____

Academic and Career Counselors work hand in hand with customers as they develop goals pertaining to career pathways. Much of an ACC's time will be spent assisting customers in thinking about long-term goals in terms of short-term objectives. Working with customers to connect "the now" with "the future" is challenging but rewarding work. By using appropriate goal setting techniques, career pathways and GED + program guidelines, ACCs will be able to illustrate the process to customers therefore creating ownership and pride.

CASE STUDY

Beth, a 27-year-old WorkOne customer, recently lost her job at a call center as a Collections Representative. She comes to the WorkOne office for help finding a new job, although she is not sure what kind of job she wants. Beth enjoys working with people and knows that her customer service skills are strong, but she feels "burned out" on collections and telemarketing. Beth says she is intrigued by the healthcare field, but does not know much about the necessary qualifications or career opportunities in the industry. She says she likes the idea of working in a stable field where she can help people. After receiving some information from her Case Manager, Beth meets with an ACC to look deeper into her options in the healthcare field.

Beth's ACC shows her a healthcare career pathway. This allows Beth to explore some of the long-term career options in the field and see what kinds of training and education she will need. After looking at the pathway and doing some research based on the job duties, average salary, and projected demand for professionals in the position, Beth decides that her long-term career goal is to become a Registered Nurse. Beth has her High School Diploma and even completed a semester of community college classes 8 years ago. Beth takes the ICE and TABE assessments. The assessments indicate that she is a strong match for the healthcare field and her reading and math skills are still sharp.

Because Beth does not have any experience or training in the healthcare field, Beth and her ACC decide that a good short-term goal would be to look into CNA training. This training could help Beth earn the qualifications to obtain an entry-level position in the medical field and will likely not force her to pay out-of-pocket.

Beth's ACC discusses different employers that have hired students out of some of the CNA trainings Beth is considering and tells her that some of them offer tuition assistance for their nursing assistants to continue their education and further their careers. This is great news for Beth because although she was excited about a career as a Registered Nurse, the costs involved in reaching that position were daunting.

Using a career pathway, Beth is motivated by the ability to take immediate steps toward starting her career and by being able to see the pathway ahead of her. Beth can see that reaching her long-term career goal will not be quick or easy, but at least she can see the steps she will need to take to reach it. She feels empowered to reach her goals.

The GED+ program is a major commitment of time and resources for most customers. A customer may be overwhelmed, anxious and nervous which can serve to derail the process. ACCs must be sure to follow up with customers frequently to support and coach proper problem-solving when challenges arise. They should offer encouragement whenever possible and let the customers know that despite the challenges, the benefits are immeasurable. It is important if and when customers become discouraged, the ACC reminds them that by persevering and doing well in training, they are likely to earn the certification and enter the career that they chose. These benefits are worth the effort that they are putting forth. Adult learners are more motivated when they see direct relevance of the information they are learning to their lives, in the form of a desired employment opportunity or an increased salary. It will be an important function of the ACC to use strategies to continually remind the customer of this relevance and to strengthen customer resolve throughout the training.

It is extremely important that the entire occupational pathway is discussed with customers, using real data that includes increasing salaries and job benefits when moving up the career ladder past the initial certifications. ACCs are responsible for coaching and guiding customers in career pathway choices using all available information.

For any customer interested in moving beyond an entry-level position in a field with an occupational pathway, it is important to discuss what options may exist beyond the initial career certifications. When discussing these options, remember to consider not only the customer's strengths and career goals, but also the customer's financial needs, median salaries and regional job market demand at different stops on the pathway. Also, customers who already have entry-level experience and a career certification will often want to look farther ahead on a pathway to determine what opportunities for advancement may be available and what education may be necessary to qualify for them. Just remember that for goals set with substantial time and education required, salaries and job demands may change during the time it takes a customer to reach that step.

An ACC is expected to have accurate and up-to-date information concerning the jobs that are available regionally and what certifications are necessary for these jobs. In addition, ACCs should have knowledge of projected opportunities and what employers will be moving into the area or hiring in the near future. Academic and Career Counselors help translate occupational pathways into realistic goals and attainable action steps for customers. Together the ACC and customer should strive to create an effective Academic and Career Plan (ACP) that builds seamless transitions from Secondary/Adult Basic Education to vocational training to post-secondary education and training. The ACP is the essential tool to develop goals and will be extremely valuable to track progress when used throughout the academic and career counseling process.

Academic and Career Counselors must strive to empower customers to take increasing responsibility in their education and career development plans. Customers experience increased motivation when they feel a sense of ownership in the goals and action steps created. Empowering customers will increase customers' resolve to follow through with all career planning.

CASE STUDY

Liz is a customer who is interested in a career as a Pharmacy Technician. She has been working at a local CVS for just over two years now, but her job duties have consisted of stocking shelves and operating the cash register. Liz has not done any work in the pharmacy department, but has become friendly with some of her coworkers there. Liz would like to advance to a job in the pharmacy department but learns that a certification is necessary to work in the field.

Liz meets with an ACC to learn more about what help she may be able to receive towards earning her certification. Liz tells her ACC that she graduated high school and enjoyed her math and science classes and earned strong grades in those subjects. While researching Pharmacy Tech training providers, Liz and her ACC discover that some programs offer certificates while others offer certificates with college credits. Liz likes the idea of participating in training with college credits because it provides not only an opportunity to advance in the short term, but also allows her to start building her education for future career advancements.

State-wide, there are seven Pharmacy Technician trainings with college credits that range in price from $3,670 to almost $16,000 and run from two semesters on the short side to four semesters on the long side.

As an ACC, how would you empower Liz to not only make the best training decision now, but also to take ownership and responsibility for her education?

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Using the above scenario as a guide- write a long-term goal for each specified client type. Then, for each step in the career pathway, write a short term goal to move through to the next phase.

Unemployed adult with a minimum of an 8th grade education
Long-Term Goal:

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Short-Term Goals:

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Unemployed adult with less than the equivalent of an 8th grade education
Long-Term Goal:

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Short-Term Goals:

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Unemployed high school student
Long-Term Goal:

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Short-Term Goals:

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On-the-Job Training (OJT)

Overview

On-the-Job Training (OJT) provides a unique opportunity for customers to obtain hands-on training with an employer. Employers have the opportunity to bring customers into the work environment to give the specific skills training that is required to perform job tasks. Customers can learn directly from an employer the skills required in the workplace while the costs of employee wages are offset by funding from the WorkOne Center. The employer also is able to evaluate and work with a customer to ensure they are the right fit for the position before incurring any business costs. The end result of On-the-Job Training should be unsubsidized employment for the customer involved.

ON-THE-JOB TRAINING
•Provides employer specific on-the-job training/experience •Unsubsidized employment should be the outcome of successful completion •Up to 50% of the training costs are offset by WorkOne

On-the-Job Training requires an agreement between a specific participating employer and individual customer. Often, the ACC will partner with a Business Service Representative to complete the necessary referral paperwork and training plans.

Audience

On-the-Job Training is a very good option for many customers interested in moving quickly into employment. Customers must be screened carefully to ensure that they are a right fit for the employer.

ON-THE-JOB TRAINING AUDIENCE
•Lack of time needed for lengthy certifications •Have transferable skills and are job ready •May not want "traditional" training

Customers that have extensive job experience or transferable skills may find On-the-Job Training particularly appealing. For example, a skilled machine operator laid off from a particular manufacturing plant may be a good candidate for On-the-Job Training to enter a similar position in a warehouse. Although this customer may not have the knowledge about the processes or how to operate the specific machinery required by the new employer, they have some applicable knowledge and will most likely pick up on the particulars of the job quickly.

Customers who have extenuating life circumstances also may find On-the-Job Training appealing. This may include customers who are not interested in more traditional trainings or do not have the time needed to attend lengthy certifications. OJT is often a very valuable experience for older youth customers.

It will be important to explore customers' learning styles, assessment results, previous experience and goals to determine if On-the-Job Training is an appropriate option.

Benefits and Considerations

BENEFITS	CONSIDERATIONS
•Paycheck •Great option for non-traditional learners •Job Placement •Accelerated career path	•Limited by availability •Teamwork to identify candidates •Funding eligibility •May not result in a certification

On-the-Job Training offers many benefits to customers. This is an opportunity for valuable training for customers that are non-traditional learners or customers who have had previous negative experiences associated with traditional educational settings. One of biggest benefits to customers is that they will be receiving a paycheck while they are attending the hands-on training. This can provide motivation while alleviating the financial burdens that customers may be experiencing. On-the-Job Training provides an accelerated path to job placement and a career.

On-the-Job Training requires a great deal of teamwork to identify candidates and identify appropriate opportunities. These opportunities may not always be readily available. Not all customers are eligible for the funding, so all candidates should be properly screened before the On-the-Job Training option is presented. Although a customer will be gaining valuable hands-on occupationally-specific skills, this kind of training may not result in a certification. If a certificate is earned, it may not be industry recognized. These considerations should be discussed with a customer to ensure they are aware before entering the OJT.

Occupational Skills Training

Overview

Occupational skills training is often an essential step for customers in entering their chosen career field. Academic and Career Counselors provide guidance, coaching and support to customers ensuring they are entering the right training program that will lead them towards their career goals. Occupational training includes technical schools, trade schools and “career” colleges. It also includes post-secondary education and proprietary schools.

OCCUPATIONAL SKILLS TRAINING
•Includes trade schools, technical schools and 2 and 4-year colleges •Specific occupational training •Provides opportunities for customers to garner a higher educational credential through a professional certification or degree •These credentials generally make the customer more desirable to employers

These training opportunities are unique, designed to meet the needs of adult learners and provide relevant industry specific information needed to immediately enter a profession. Upon completing these training opportunities, customers should be prepared to pass objective certification measures necessary to obtain particular jobs that currently exist in the workforce. All training opportunities should be geared toward an in-demand occupation in a growing industry. It is important that training is directly connected with employment opportunities. A distinguishing factor of occupational training is the opportunity to gain valuable experience through hands-on experiences. These types of training programs often provide an environment for customers that closely match the work setting.

Audience

Occupational training is an excellent option for customers who are interested in upgrading or learning new skills required to enter an in-demand occupation. The customer and ACC should work together to ensure that the customer is properly assessed and can meet the academic demands of the program. This may be through explicit Ability to Benefit TABE scores. There will be times, though, that an ACC may need use their discretion to ensure that a customer has a reasonable likelihood of being successful in their chosen training.

OCCUPATIONAL TRAINING AUDIENCE
•High School Diploma and meet Ability to Benefit •Seeking career in an in-demand occupation •Seeking industry recognized certification

Customers should be encouraged to enter the GED+ program if they do not yet have a GED or High School Diploma, so they can simultaneously work toward earning their GED in Adult Education while working toward a certification in occupational training.

Benefits and Considerations

It is important for an Academic and Career Counselor to provide proper guidance in the occupational training selection. This is a large commitment for customers.

BENEFITS OF OCCUPATIONAL TRAINING
•Contextualized learning •Credential/certification increases marketability •Increases in lifelong earning power

Customers' decisions on which training program and provider to choose must only be made after intensive counseling sessions. ACCs must provide advice using expert opinions and factual information in order to ensure the customers are making informed decisions. Training should always be viewed as an investment for customers, beyond the financial expense. It is an investment of time, resources and

effort. ACCs must be sure that customers have the desire for the training, as well as the ability to meet the demands, proper resources to support their efforts and the aptitude to be successful.

CASE STUDY

Blake is a 20-year-old WorkOne customer. Since graduating high school, he has been working as a security guard. Blake is interested in following in his father's footsteps and becoming a machinist. Blake has connections through his father at his father's plant, but he will need to complete occupational training to qualify for a job.
Blake takes the TABE and ICE assessments. On the TABE, Blake earns scores of 10.7 in reading and 11.2 in math. On the ICE, he scores a 95% match for "Manufacturing" on the Career Search interest assessment, but on the skills assessment, he is only a 76% match. He scores higher for "Law, Public Safety, Corrections and Security" and "Science, Technology, Engineering and Mathematics". His Work Values Inventory indicates a preference for a job with stability and independence.

Based on his assessment results and career goals, what training plan would you guide Blake towards? Why?

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When making the decision of which training provider to pursue, customers should be encouraged to consider all factors, beyond just the length, location and cost of the program. Customers must be sure that the training truly reflects their long-term goal. Training should be considered the first action step in ultimately entering a chosen career. Uninterested or unmotivated customers are at high risk of dropping out or being unsuccessful once they enter the workforce.

ACCs must assist customers to make a realistic assessment of the job market, professional development potential, and discuss their own qualifications.

SOME CONSIDERATIONS TO DISCUSS IN ACADEMIC AND CAREER COUNSELING SESSIONS WHEN CHOOSING AN OCCUPATIONAL SKILLS TRAINING PROVIDER:

- Is the customer certain of the occupational field when entering school?
  - Did the customer research the job market?
  - Is the skill, credential or certification in demand?

- Is there additional schooling needed to enter the desired occupation?
  - Is it a better decision for the customer to acquire the skills needed for the occupational field while working and earning money?
    - Important to carefully research occupational information.
    - Talk to a Business Service Representative about qualifications and

requirements of entry level jobs.

- Does the customer have appropriate resources in place to make the commitment needed for training?
  - How long can the customer afford to be in training?
  - Has the customer carefully reviewed their financial resources?
  - What additional non-financial resources will the customer need to secure in order to be successful in training?

- Have the customer's prior experiences in education been positive or negative? How will this affect motivation?
  - What are the resources available in the customer's household to support training?

- Is the customer able to handle the responsibility and juggle the competing demands?
  - Is the customer ready and able to balance all responsibilities associated with a rigorous training?
  - Does the customer have the ability to stick to a long-term plan?

It is important to continue to use the Strength-Based and empowering approach to help foster customers' self-exploration and ensure that they are entering the occupational training that is the "best fit" for their goals, values, strengths and life circumstances. ACCs should concentrate on asking open-ended questions during academic and career counseling sessions.

Below are some example conversations between an ACC and customer:

Conversation #1:

ACC:	So, what interests you about a career in teaching?
Customer:	It's always been something I've been interested in. I love kids. When I was in high school, whenever anyone asked me what I wanted to do, that was always my answer.
ACC:	Great. After you complete training, what kind of jobs would you be qualified for?
Customer:	I guess I'd have some options. I could work at a daycare center or try to get a job as a teacher's assistant with the school district. In the end, I'd really like to be a real teacher with my own class, but that would require even more school. I don't think I can afford that all right now.

ACC:	Those are some good options. You mentioned the school district. What are some other possible employers you might look to? Do you know if any of these employers are currently hiring?

The ACC is encouraging the customer to think beyond the occupational training completion to develop a plan to enter a career pathway.

Conversation #2:

ACC:	What benefits do you think employers see in education vs. experience when they look at potential employees?
Customer:	Hmm, I guess with education, you know more about your job and you're less likely to make bad mistakes. But I always felt like I learned more by actually doing a job, so experience is important too.
ACC:	For the job you're looking for, which do you think employers will value more highly?
Customer:	When I'm looking for jobs my career area, it seems like most of them ask for at least two years of experience. Not everyone requires certification.
ACC:	Ok, you have a lot more than two years experience. Do you feel like you're qualified for a lot of these jobs right now?
Customer:	I know I'm qualified. I just want to see if a training could help me advance my career.
ACC:	I like that confidence and I admire you thinking towards the future. How would you feel about looking at a part-time training that would allow you to work while going to school?

The ACC is coaching the customer by using open-ended questions to explore all possibilities.

Conversation #3

ACC:	Going back to school is a big commitment. In addition to the cost of tuition, there can be other expenses like books and supplies. Also, you'll need money to support yourself and your family while in school. What resources do you have to get by while you're in school?
Customer:	I thought you would pay for all of that.

ACC:	We can certainly help, but we won't be able to cover all of your expenses. We can look at grants or financial aid you may be eligible for, but it's important to have a plan for expenses that they won't cover. What kind of family support can you count on?

The ACC is preparing the customer for what to expect when they enter training and encouraging the customer to explore their own resources. It is crucial that a customer has a clear understanding of what to expect and the commitment training will entail in order for them to be successful.

REFLECTION

How does asking open-ended questions and using an empowering approach foster motivation to see a training plan through? What kind of evidence could you look for to support customers' answers?

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It may also be necessary to use constructive confrontation techniques when working with a customer who may not have the support, resources, or ability to complete training.

EXERCISE

Develop strategies for addressing these issues with customers:

1. A customer who has not demonstrated an ability to follow-through and complete long-term tasks or projects.

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2. A customer who does not have the financial resources to complete the training they prefer.

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3. A customer who does not seem to have the personal support to juggle family obligations and the full-time training they insist they need.

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Proprietary Schools

Many institutions offering occupational training programs are proprietary schools. They are privately owned and for-profit businesses. These schools often spend a large amount of money on marketing campaigns and have sales people that speak with any interested students. ACCs must be sure to advise customers to proceed with caution when researching these programs. The proprietary schools are businesses interested in making money and attracting more students is often the goal without proper assessment of the customers' ability to succeed. An ACC should provide intensive counseling to a customer to ensure that training program is the best possible choice for the individual prior to the customer signing a contract with financial obligations.

REFLECTION

List some potential drawbacks to referring customers to for-profit proprietary school?

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What are some alternative education choices to proprietary schools for customers seeking occupational training?

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Post-Secondary Training

Post-secondary training through a community college or career college provides opportunities for customers to garner a higher educational credential through a professional certification or degree. These will often make a potential employee more desirable to an employer. The two common post-secondary education providers in Indiana are Ivy Tech and Vincennes University.

Often these post-secondary institutions are "go-to providers" for occupational and post-secondary training. It is extremely important that customers are assessed and counseled to ensure that this is indeed the right fit and right training placement for the individual customer. Counseling should adequately address and assess customers' interests, goals, career choices, strengths, motivations, aptitude, life circumstances and current resources. The ACC and customers should carefully examine the programs' graduation rates, certificates, length of study and rigor of the program. All information should be examined before making a decision to ensure there is not a better training option for a customer. An ACC should work with customers to make sure they are making the best possible decision for training.

In most cases, customers who are planning to attend a post-secondary institution that requires a placement exam should not be referred to take the exam until their TABE assessment scores are between 11 and 12.9. This will indicate customers will have reasonable success to enter credit-bearing classes. ACCs do have discretion to decide if they feel a customer is ready to sit for an entrance or placement exam.

All customers pursuing post-secondary training from these institutions should enter credit-bearing courses. If a placement exam shows the customer is in need of remediation, they should be referred to Adult Education. A customer should not take out loans or incur financial burdens for skills remediation they can receive through Adult Education.

Identify some free adult education options for customers who fail to meet the 11th grade ability to benefit score on the TABE test.

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Ivy Tech (http://www.ivytech.edu)

Ivy Tech is the nation's largest state-wide community college and Indiana's largest public post-secondary institution. Ivy Tech serves nearly 200,000 students every year. The mission statement is "Ivy Tech Community College prepares Indiana residents to learn, live and work in a diverse and globally competitive environment by delivering professional, technical, transfer and lifelong education." Ivy Tech is accredited by the Higher Learning Commission of the North Central Association of Colleges and has several other regional accreditations. Ivy Tech offers thirty locations throughout Indiana to earn degrees and seventy-five locations to take classes. Ivy Tech offers a wide variety of degrees and certifications. Students may also take classes through Ivy Tech and chose to transfer credits to a 4 year university. Within Ivy Tech there is an opportunity to receive training from the "Corporate College" or a 2-year program.

Ivy Tech Corporate College	Ivy Tech 2-year
-Offers non-credit bearing courses -Fewer admissions requirements	-Credit bearing courses -COMPASS is required for admissions

Ivy Tech recommends prospective students complete an application for admissions which can be found on their website. The application is valid for 2 years and can be used for any campus throughout the state. Students must also complete the Free Application for Federal Student Aid at this time. ACCs should be familiar with this application and be able to assist customers to correctly complete this application. Prospective Ivy Tech students then attend a new student orientation session at the campus they wish to attend. This is required for students pursuing a degree and recommended for those who do not intend to seek a degree.

It is critical to know the local admissions representatives and the local Corporate College representative to assist customers. Bigger campuses also have career services and financial aid staff members. The list of Ivy Tech contacts by region is available in the appendix section.

All Ivy Tech 2-year prospective students are required to schedule and complete the COMPASS assessment prior to enrolling. The COMPASS is a skills assessment tool used by Ivy Tech to ensure customers are taking classes that fit their academic needs. It includes sections on writing, reading and math. Customers should have scored at least an 11th grade level on the TABE test prior to taking the COMPASS assessment. This will make the need for remedial courses less likely. If the COMPASS assessment indicates a need for non-credit bearing remedial classes, a customer should be encouraged to enroll in Adult Education to address this need.

Ivy Tech considers credit for Prior Learning (http://www.ivytech.edu/pla/). The easiest way to earn credit for prior learning is if the student has a certification that has already been crosswalked (http://www.ivytech.edu/pla/CertCrosswalkAugust2011.pdf). For instance, a CNA can earn 3 credits for the nursing fundamentals lab, assuming the CNA is admitted to the nursing program. It is important for the customer to understand that the certification does not guarantee credit. The certification must relate to applicable coursework the customer is pursuing.

Some of Ivy Tech's course offerings are restricted and admission into the program is difficult to achieve. These will change over time, it is important however that ACCs are aware of these programs in order to properly coach and advise interested customers. ACCs also should be wary of short-term certificates that do not lead to industry recognized credentials. These may not help customers to obtain employment in the long run. The ultimate goal should always be a career. Ivy Tech is prevalent in most areas of the state and it is critical for our ACCs to have a solid understanding of Ivy Tech's process but it should not be the only option customers should consider.

Vincennes University (http://www.vinu.edu/cms/opencms)

Vincennes University serves over 10,000 students every year and states they are a "great educational value" being "Indiana's most affordable residential college." Vincennes University offers more than 200 programs. These programs are career focused and prepare students for the job market in 1 to 2 years. Vincennes also offers bachelors programs and the opportunity for students to transfer credits to other four year institutions.

Prospective students that are applying for a degree or professional certification program must have a GED or High School Diploma. There are provisions for applicants with a High School Diploma not earned through a Graduate Qualifying Exam.

By researching other training opportunities before enrolling, the ACC and customer should determine if a post secondary institution, such as Ivy Tech or Vincennes University, is the most appropriate provider.

REFLECTION

What personal barriers should be addressed before making a recommendation for a customer to enroll in a post secondary training?

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EXERCISE

Please read the following customer profiles. Identify for each customer the best training option: Adult Education, GED+, On-the-Job Training or Occupation Skills Training. Also, use the space provided to explain why you made this choice and 2 possible next steps for each customer.

1) Penelope has always loved working with children. She volunteers three times a week with an after school program through a local community center. Most of her previous experience has been in housekeeping. Penelope is interested in attending training to make her more qualified for teaching assistant positions. She does not have her High School Diploma but scored above an 11th grade level on both the math and reading portions of the TABE assessment.

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2) Matt has over 10 years experience working in a manufacturing plant. He was a machine operator until being laid off. He has his High School Diploma. He is unsure what his options are now but expressed interest in learning a new skill, maybe in Information Technology. He took the TABE test and scored a 4.5 on the math portion and a 9.3 on the reading.

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3) Kara has 5 years of working as a picker/packer until the warehouse closed down. She was able to work her way to a supervisory position. She took the TABE assessment and scored 11.4 in reading and 11.0 in math. She is interested in staying in the same field. She stated that her old supervisor contacted her last week and informed her that there is a new large warehouse opening in the next 3 months in the area.

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4) Jason is 18 years old. He dropped out of high school in his junior year. He does not have any work experience. He states he is interested in becoming a truck driver. He took the TABE assessment and scored 6.0 in math and 8.9 in reading.

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MINDLEADERS (MindLeaders.com)

MindLeaders is a web-based system that allows customers to both assess their current skill level and build skills through over 2,000 available interactive courses. Customers can use the skills assessments to test their understanding of course material before they begin.

MINDLEADERS
•Web-based system that allows customers to build their skills •Offers over 2,000 interactive courses •Self-paced and offer a certificate of completion •Business and Technical courses available •Core WorkOne Service

MindLeaders is most frequently used by customers to build skills and increase job potential. A MindLeaders license offers 24/7 access to everything from software skills to leadership, from basic math to advanced Excel. The courses are self-paced and offer multi-step simulations to give customers an opportunity to practice what they have learned. Once customers have mastered every lesson in a course by reaching mastery through either the course or the skill assessment, a certificate button appears in the lower left corner of the scores screen. The Certificate of Completion can be printed from most printers.

Some examples of the courses offered through MindLeaders include:

MindLeaders allows customers to build and prove their competencies. Technical courses prepare users for the computer skills one needs to keep an organization working.

Regions have been allotted licenses to issue customers looking to build and improve their skills. Customers should be pre-qualified as computer literate before using MindLeaders. Once the license has been issued, students must establish a password to access the courses. Students can take courses as often as they choose, even taking the same course multiple times. Each license is issued for one year from the date of enrollment. Indiana customers have access to both business and technical courses.

UNDERSTANDING AND ANALYZING REGIONAL POLICY

ACCs must be able to research applicable regional policy concerning training options, funding options and state and federal WIA policy. Regional policy is likely to have different inflections and interpretations which may affect customers' training eligibility and pursuits. There may be situations where there are customers crossing between regions. In these cases, an ACC must not only be familiar with their own region's policy, but they must be able to analyze and apply other regional policy.

REFLECTION

Which regions may your customers cross over into for trainings? Where can you access the policies of those regions to ensure the best service for your customers?

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All regional policy overrides state policy. For example, statewide policy allows a maximum amount to be spent on Individual Training Accounts (ITAs) but often regionally the amount issued may be different. Customers who have degrees or certifications in an "in-demand" occupation or field may not be approved for training. Individual regions have the authority to interpret this policy and make exceptions as they find necessary. Any decisions about training eligibility and exceptions are made regionally as long as they are in compliance with state and federal guidelines. Some exceptions may be tied to income limitations.

It is therefore extremely important for ACCs not only <u>know</u> specific information but also know <u>where to find</u> the most up to date information quickly and efficiently. It is essential that ACCs are skilled in integrating information to facilitate customers' problem solving and making the most informed decisions when they are selecting training.

Developing and Updating Academic and Career Plans

Academic and Career Counselors must use all available information to make the most appropriate training referral. All information must be integrated and used in appropriate coaching and counseling sessions. Customers' life circumstances, motivations, aptitudes and career goals must be the context for all training decisions. Customers should receive in-depth interpretations of all assessments which may give valuable insight and lead to deeper self-exploration that is needed to ensure that a particular training program is a correct fit for the customer.

CASE STUDY

Alex is a WorkOne customer who has requested to meet with an ACC because he is interested in attending training. While meeting with the ACC, he states he is interested in training for a career in medical billing and coding. Alex has taken the ICE assessments and scored very low in the "Health Science", "Information Technology" and "Science, Technology, Engineering and Mathematics" sections for the assessments of both interests and skills. "Variety" and "Creativity" were at the top of their Work Values Inventory.

The assessment results indicate a strong need for the ACC to have an in-depth conversation with Alex about his training interest and current career goal. Alex's assessments indicate that he does not have skills or a strong interest in the medical billing and coding field he expressed interested in pursuing (shown in his low assessment results in the Health Science, Information Technology and Science, Technology, Engineering and Mathematics career clusters). The assessments also indicate that variety and creativity are his top values. Medical billing and coding can be monotonous and offer little in the way of creativity. Alex's assessments seem to indicate that he may not be satisfied in a career in medical billing and coding.

The ACC should be sure to point out the discrepancies indicated to spark an in-depth conversation. The results may indicate that Alex does not have a strong understanding of the work involved and tasks a medical biller would be responsible for. Alex may benefit from further career exploration.

What other factors may be important for an ACC to explore with Alex while developing his career goals and educational plan?

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What are some strategies an ACC can take to assist Alex in forming concrete career goals?

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Training decisions and referrals must always be detailed appropriately in the Academic and Career Plans as short-term goals and actions steps needed to obtain a long-term occupational goal. It is important that training is never the end goal but considered a stepping stone to a career. All training goals must be realistic. It is the Academic and Career Counselors' responsibility to support customers in developing attainable career goals through action steps. Goals that are attainable and realistic are often more motivating for customers.

Alex performs career exploration and researches the medical billing and coding position. He is surprised by the amount of time spent on a computer and working alone. He stated that he thought this position would have more contact with patients. One of the main reasons he wanted to pursue a career in the medical field was to help people. While researching, he spoke at length to a medical assistant who also worked at the front desk of his local doctor's office. After looking into the position more at length using O*Net and ICE, he decided this was a much more interesting career option.

Alex and his ACC review his TABE assessment score. He scored high in reading (12.1) but scored only an 8.9 in math. Alex does not have a GED and left high school after completing the 11th grade. Through academic and career counseling, Alex and his ACC decide that his first step should be to get skills remediation and prepare to take the GED exam. When he boosts his math score to 11.9 he can enter the GED+ program where he will be able to pursue Adult Education and Occupation Skills training simultaneously.

With the ACP, Section III-Employment Plan contains sections where a customer and ACC can explicitly detail the academic and training plans.

Sample ACP for Alex:

Education Goals

Long-Term Education Goal: To obtain a medical assistant certification by attending occupation skills training (GED+). To obtain GED.

Short-Term Education Goal: Increase current math TABE scores to 11.9 through attending Adult Education.

Strategy for Achievement: Attend classes at ABC Adult Ed Center to continue skills remediation.

Notes: Customer completed through the 11th grade. He is motivated and enthusiastic about attending training. In addition to attending Adult Education classes he will use online remediation tools available at the WorkOne Center to increase his TABE scores to qualify to attend training.

The training steps needed to reach career goal plan should also be detailed in the larger Goals and Interests section. Usually these will be action steps or short-term goals. Training is often the first action step needed for customers to pursue their ultimate career goal. Goals must always be attainable, specific and time sensitive. Adults pursuing training often have a sense of urgency due to many competing demands of their lives. It is important for ACCs to recognize this and support customers in creating steps to accomplish their training needs as quickly as possible. More information about creating goals and completing the Academic and Career Plan can be found in the Goal Setting section of this manual.

Sample ACP for Alex:

Goals and Interests

Date Set: 12/2/11

Goal Type: Career

Description: Obtain work as a Medical Assistant/ Medical Receptionist

Action Step: Successfully complete occupational training.

Action Step: Use online resources and Business Service Representatives to locate and apply for Medical Receptionist positions at doctor's offices and intake positions hospitals.

Status: Set but Unattained

Planned Date of Attainment: 9/1/2012

Date of Attainment:

(2)

Date Set: 12/2/11

Goal Type: Basic Skills

Description: Raise my math TABE score from 8.9 to 11.9 in order to attend Medical Assistant training and be successful. Obtain GED to make me more competitive in the job market.

Action Step: Attend classes with at least 97% attendance. Complete all assigned work.

Action Step: Attend WorkOne Center at least 3 times/week to use online skills remediation tools.

Status: Set but Unattained

Planned Date of Attainment: 5/2/12

Date of Attainment:

(3)

Date Set: 12/2/11

Goal Type: Training Goal

Description: Gain acceptance and attend an occupational training program for Medical Assistance. Simultaneously, continue Adult Education until GED is achieved.

Action Step: Use INTraining to search for training programs in my area. Visit each school and complete application process.

Action Step: Maintain attendance record of at least 97%.

Action Step: Continue to attend Adult Ed until GED is achieved.

Action Step: Explore internship opportunities to gain hands-on experience and boost resume.

Status: Set but Unachieved

Planned Date of Attainment: 7/15/12

Date of Attainment:

A customer will likely be more motivated to follow through on an education goal if the training could lead to is something the customer truly wants to do. If the training can be successfully completed in the near future and the customer already has a base of skills or knowledge to apply to completing the training, the goal will be even more realistic and immediately attainable. This can reduce some of the discouragement and frustration that customers may experience when they have a long-term career goal but are unsure of how to achieve it or do not believe they have the abilities to reach it.

REFLECTION

What are some possible results of failing to set effective goals?

_____

_____

How does an ACC facilitate the goal setting process?

_____

_____

The Training Plan must also be completed for any customer enrolling in a program. This allows all information about customers' training to be collected and easily accessed.

Sample ACP for Alex:

Training Plan

Co-Enrolled in Adult Education: Yes

Co-Enrolled in WIA Adult/Youth: No

Occupational Skills Needs: High School Diploma/GED preferred. Need TABE Math Grade Equivalent of 11.9-12.9. Scored 8.9 Referred to ABC Adult Ed Center for GED prep and skills remediation. GED+ program for Medical Assistance

Date Drug Test Administered: 4/15/12

Results: Pass/Fail: Pass

Enrollment Date: 4/20/12

Training Provider: XXX Medical Assistant Training

Training Provider ID: XXXXX

Training Program: Medical Assistant

Training Program ID: XXXX

Completion Date:

Career Certification Program: Yes

Adult Education/Remediation Needs: Need to increase math scores from grade equivalent 8.9 to at least 11.9.

Assistive Technology Needs for Persons with Disabilities for Attaining Career Goals: N/A

Required Supportive Services During Active Participation:

Post Employment Needs:

Notes:

For more information on completing the Academic and Career Plan, please refer to the Sample ACP and Supporting Document guide located in the appendix.

INTRAINING <https://solutions.dwd.in.gov/INTraining/index.htm>

INTraining is an online system containing detailed information about all Workforce Investment Act approved training providers and occupational programs. All providers eligible for federal WIA funding are listed on the site and can be reviewed by ACCs and customers, and the general public. Programs listed must meet WIA legislation, state policy and performance criteria.

INTraining is a very user friendly system in which one can access up-to-date and relevant information about available training providers.

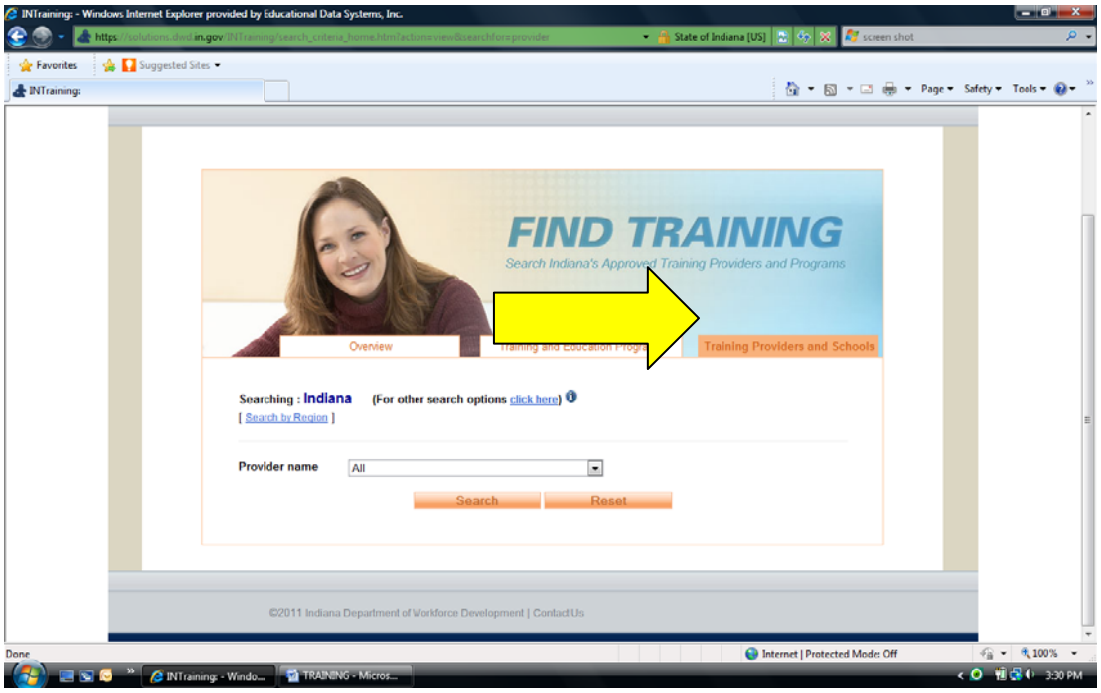
Academic and Career Counselors can use the system to guide customers' research of potential training providers. ACCs have freedom to tailor their approach with each individual. It may be necessary to access the system with the customer in some cases, but with other customers a more appropriate approach might be to refer them to research themselves after an initial familiarization with the site.

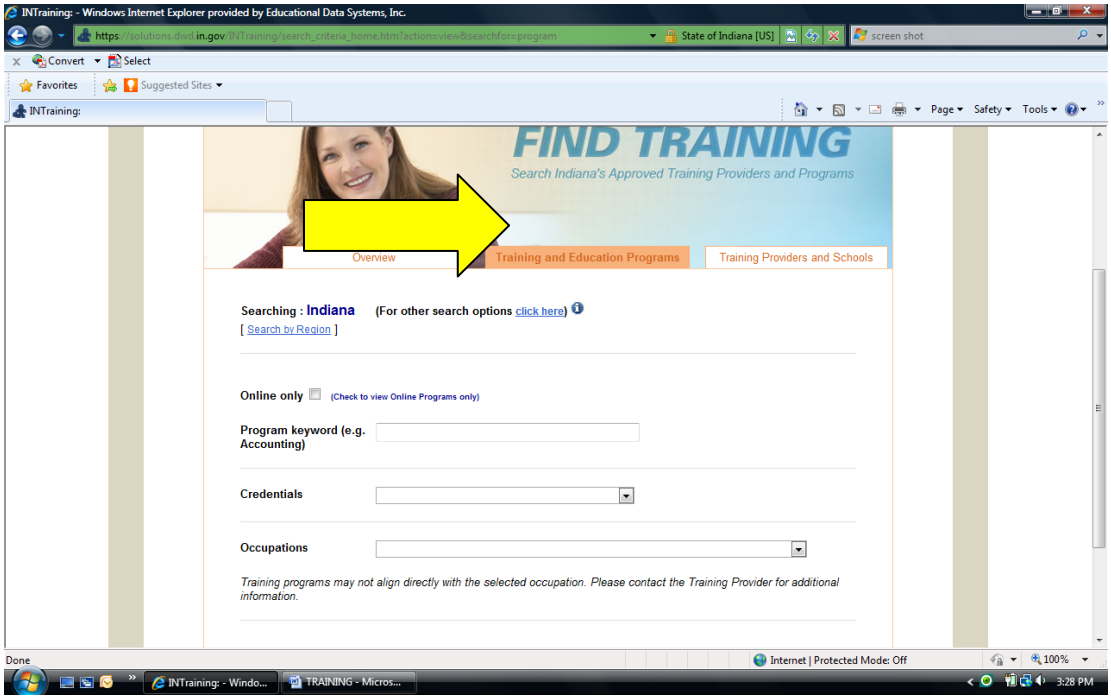
INTraining allows users to search by program, provider, credential and occupation or location. It is also possible to narrow location by both region and state.

BENEFITS OF INTRAINING
•Allows users to use specific search criteria •Occupational and Training research •Convenient and accessible by the general public •Comprehensive and easy to use •Lists WIA approved providers

Using INTraining

A user can search for approved training providers and programs by selecting the “Training and Education Programs” or “Training Providers and Schools” tabs from the “Training Providers” option located on the main page (middle orange block).





The following will be helpful when conducting searches:

Training Provider: Lists all public and private education and training institutions identified by the State of Indiana eligible to receive funding.

Program: Lists all approved programs submitted by eligible training providers that prepare participants for entry into an occupational field and result in a credential.

Credential: Lists all approved programs with specific credentials. This feature will allow the participants to search, review and compare credentials that have been delineated in their Academic and Career Plan so the most appropriate program can be selected.

Training Site Location: Lists the physical location of each training site searchable by state, city, county or region.

Occupation: Lists approved programs for selected occupations. Currently, only occupations with training programs are listed.

Online programs: Lists approved programs that can be completed online. ACCs must be very careful in advising or referring a customer to an online program. It is important that the individual customer has the proper motivation and self-direction to be successful with this kind of program.

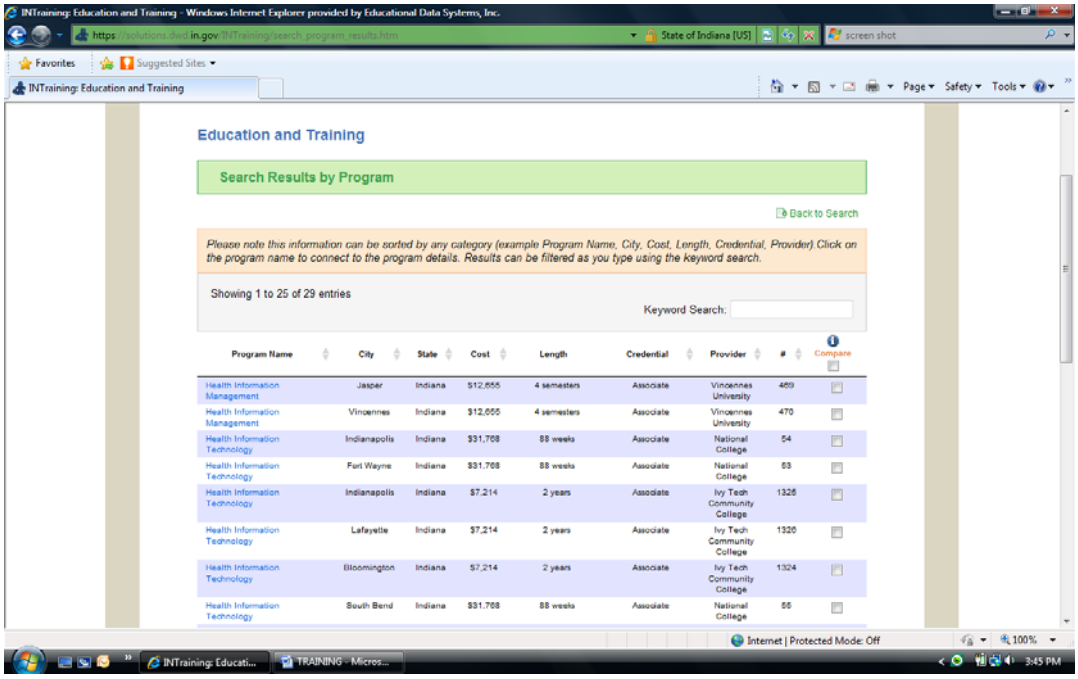
It may be necessary to be creative in choosing which search words to use.

For example-

- A keyword search for truck driving would not yield a tractor-trailer program. In this case, it would be more useful to search by the credential "CDL licensure."
- A state-wide search for "Welding" yields 89 results: 64 of those results are for programs offering degrees or certificates in "Industrial Technology" in which welding is only one of many skills taught. If a customer wanted a training that solely focused on teaching and developing welding skills, a better search may be for "Steel Welding", which yields ten results, all of which focus more on the specific keywords.

Searches by program and/or credential will probably be used most often and be most helpful to ACCs and customers.

All training programs have passed an extensive approval process to become eligible for WIA funding and placement on the INTraining website. The approval process is stringent and can be lengthy in order to ensure that all tax dollars are well spent and customers receive quality education which will lead to the skills and qualifications necessary to obtain employment. WorkOne employees are encouraged to work in collaboration with management to notify qualified training providers of the opportunity to apply for status as an approved training provider. ACCs should have confidence in the training programs that have passed the approval process. If WorkOne staff or ACCs are aware of a program that is non-performing or has other issues, they should notify their management team immediately. Their management team will alert the INTraining staff so appropriate action can take place.



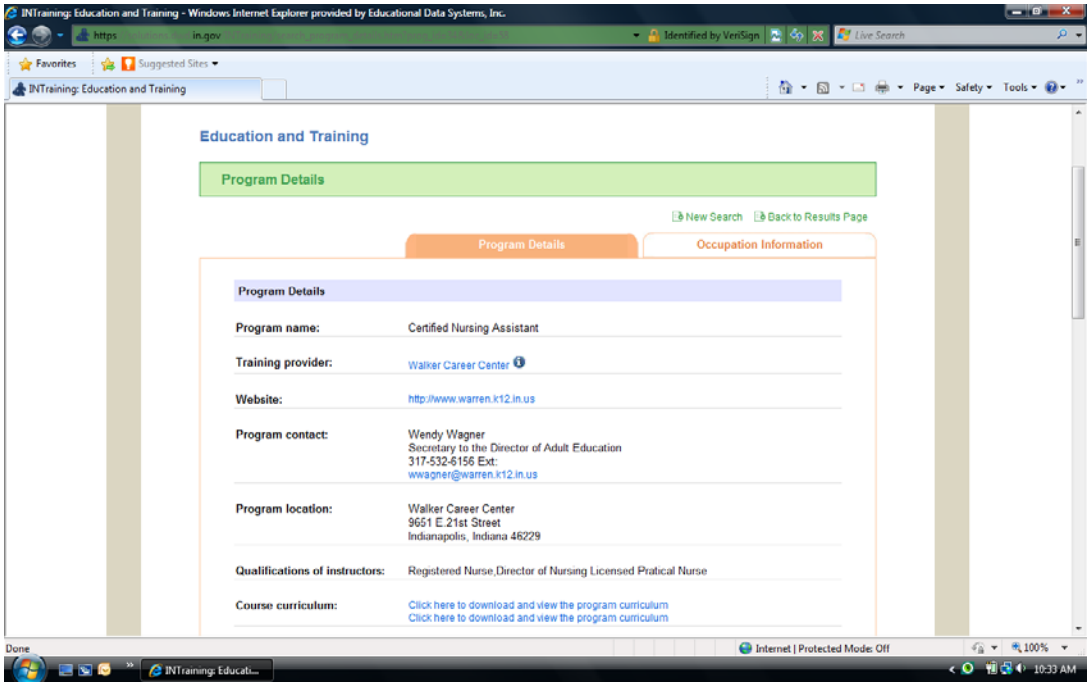
Each training provider and program has a profile that is included on quick reference list from the search page. Using this list, an ACC or customer can quickly compare a large number of programs by location, cost, length of training and credential earned.

It can be very helpful to narrow the programs that fit the customer's needs and goals to a manageable number. An ACC should always guide the customer to the provider offering quality training which results with the desired credential in the shortest amount of time and at the lowest cost available.

REFLECTION EXERCISE

Think of another occupation that interested you at some point in your life. Use INTraining to see what kind of trainings in that field may be available in your region. Try and target the shortest, most cost-effective training that results in a credential that would qualify someone for employment in that field.

Every training program listed on the INTraining website has a detailed profile that can be viewed by simply clicking the program name. These profiles provide expanded information on each provider and program so customers can thoroughly research before deciding which programs are most compatible with their goals, strengths, learning styles, current life circumstances and training needs.



The information included in each program profile is:

- Program Name
- Training Provider
- Website
- Program Contact
- Program Location
- Qualifications of Instructors
- Course Curriculum
- Program Description
- Admissions
- Prerequisites
- Percentage admitted to the program
- Application deadlines
- Career Counseling available
- Part time enrollment available
- Costs including tuition, admission fees, books, supplies, tools, labs, and any miscellaneous costs
- Average cost per credit hour/class
- Financial Aid
- Refund Policy
- Program Information
- Offered online
- Times offered
- Length of training
- Number of Credits
- Credential Type
- Certification/ Licensure required to work in this field?

- Test required
- Program accreditations
- Job Placement Offered

The decision of what training provider and program to attend is ultimately the customer's choice. Customers cannot obtain WIA funding for a training program not listed on INTraining. Customers are able to pursue a training that is not approved but they will be responsible for funding. ACCs should inform customers they will be responsible for the training payment if they choose to attend a training that is not approved and listed on the INTraining website. The priority must always be to coach the customer to make the most informed decision and ensure the "right fit" in a training program.

How would using the detailed profiles for trainings help you to guide the customers to the training that is right for them? What are some other factors that customers should consider when choosing a training provider?

_____

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_____

In what instance might a customer choose to pursue a training ***not*** listed on INTraining?

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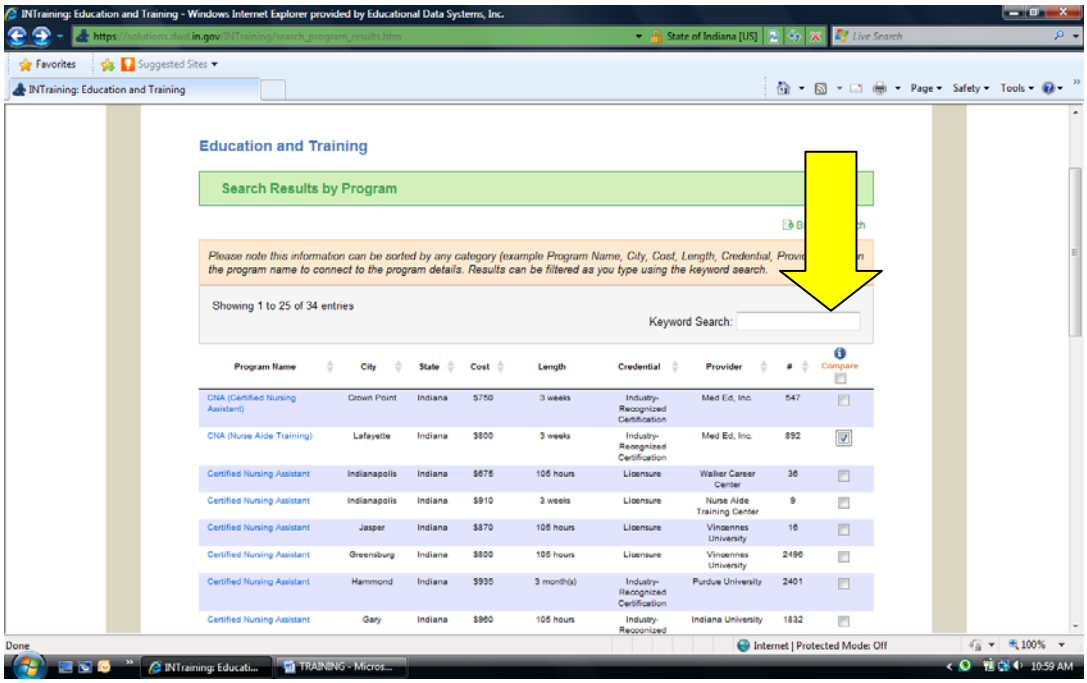
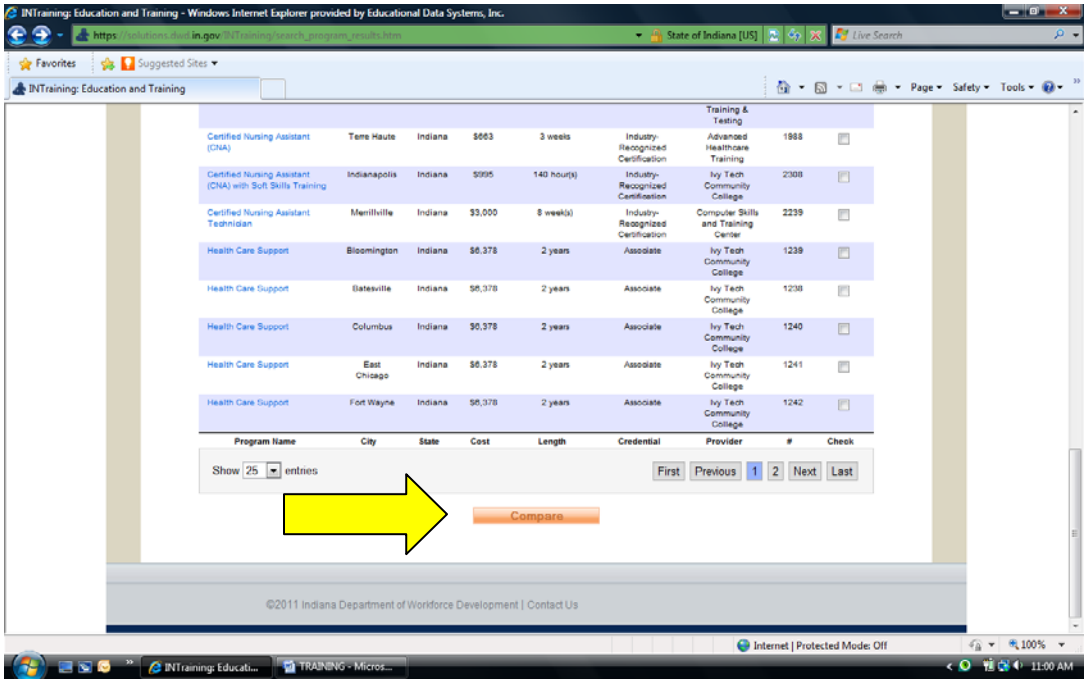
INTraining also offers a "Compare" feature that will allow Academic and Career Counselors or customers to narrow the search results in order to look at only those programs that are most interesting or relevant. To do this, the user must check the box to the left of several program entries on the "Search Results by Program" results list.



When all program entries that the user is interested in are selected, they can push the “Compare” button at the bottom of the list.

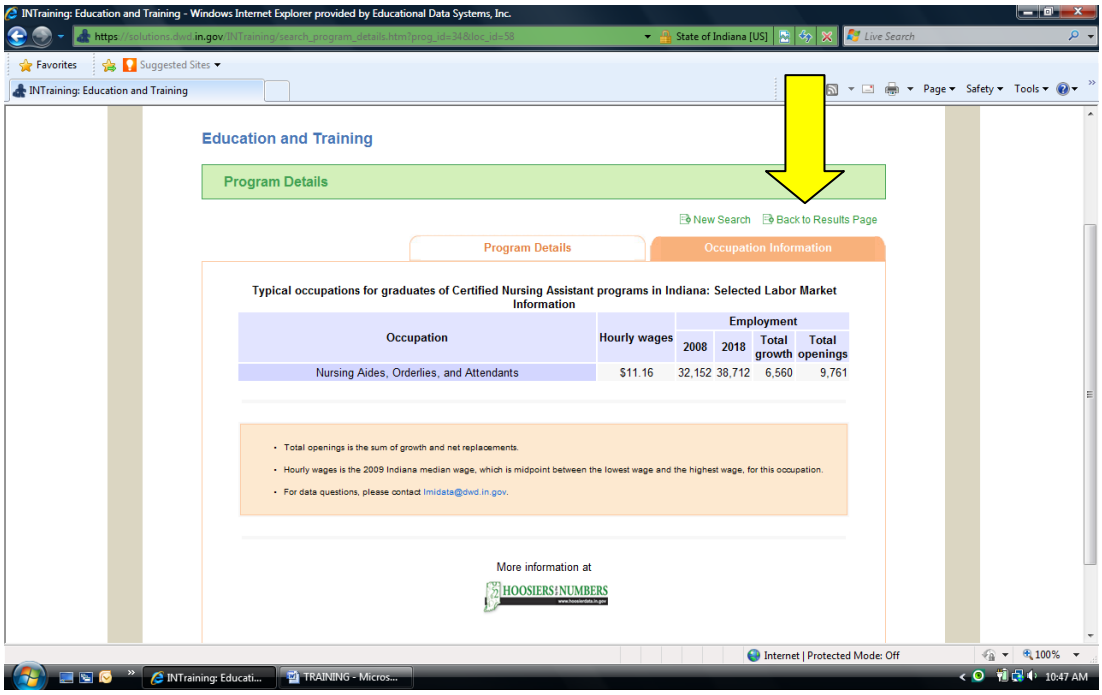


This will allow the user to look at only the programs or providers selected and can be helpful in comparing the details and effectively narrowing the training search to a selected few providers.

In addition to the compare feature, the users also can use the keyword search located in the upper-right hand corner of the screen to narrow their search even more. For example, a user may perform a search on all C.N.A. programs in Indiana, but only want to see programs offered by IVY Tech Community College. By typing "Ivy" in the keyword search, only C.N.A. programs offered at Ivy Tech will appear on the screen. The keyword feature can be used to identify a particular city, cost, credential, etc.

Using INTraining for Occupations Information

INTraining also offers a feature which provides insight into the occupational field associated with the specific training programs. This information will be extremely important when researching programs. The Occupation Information tab provides job titles associated with the training program, average hourly wages, employment growth specifics and total job openings in Indiana. An Academic and Career Counselor should discuss this information with customers while they are developing career goals and researching possible training programs.



It will be essential that ACCs discuss the details of the occupational information with customers to ensure that they have a thorough understanding of the data and how to appropriately apply it to their situation. For example, it may be necessary for an ACC to explain the wage information to customers so they are not misled. The hourly wage listed is the median of *all* reported wages in the given occupation. This includes all professionals with a specific job title, including those that have extensive experience and more education. It will be important to ensure that customers understand the wages do not necessarily reflect those of an *entry- level employee* in a given occupation. Entry-level wages will tend to be lower than the median hourly wage listed. ACCs must strive to ensure customers have realistic expectations of the desired occupation. This is a good opportunity for ACCs to discuss long-term goals and the career development pathways with customers.

The Resource Tab is available to users and can assist them with finding the right training provider, financial planning, career exploration and skills upgrading. The ACCs should be familiar with these resources so they can direct customers to specific resources as appropriate.

Additional valuable occupational resources are available through other sources. For more information, see the Occupational Resources section of this manual.

CASE STUDY

Jeremy, a 24 year-old customer, is referred to meet with you by his Case Manager because he is interested in obtaining his CDL with the goal of obtaining employment as a truck driver. After beginning to fill out his ACP with his Case Manager, Jeremy comes to you to finish it. Jeremy has a G.E.D. and a work history that includes warehouse and general labor jobs. Jeremy has recently moved to Indianapolis and wants to get a job driving a tractor trailer because of the projected growth in the industry and because he loves to drive.

You introduce Jeremy to the INTraining website and explore his training options in Indianapolis. A search for "driver" yields 13 training results, 7 of which are in Indianapolis. Jeremy selects the 7 Indianapolis based trainings and uses the "Compare" feature to narrow his results.

All 7 trainings offer a Commercial Driver's License credential for successful completion of the training, although one of the trainings only offers a Class B CDL. That training is roughly half as expensive as the next cheapest training (about $1,500 less) and only runs for only one week while the other trainings are at least three weeks long. Both Class A and Class B CDLs would allow Jeremy to drive vehicles that weigh over 13 tons, but with a Class B license, he could only tow trailers weighing 5 tons or less.

How would you help Jeremy weigh his options when trying to determine which training is right for him?

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_____

What additional information would you look for on INTraining when trying to help Jeremy reach his decision?

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_____

_____

Jeremy decides he's willing to put in the extra time to get his Class A license because of the additional career opportunities, potential earning power and flexibility it would afford him. The cost of the remaining 6 training providers range from $3,200 to $4,271. Some training programs take as little as three weeks to complete, while others are eight weeks long.

As an ACC, it is important to try to ensure that the quality of the training is high and the length and cost of the training chosen is kept to a minimum. What other factors could be important to consider when deciding which training program will offer the most value and provide Jeremy the best chances to reach his long term career goals?

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Jeremy decides to pursue enrollment with a 3-week training program that while not at the lowest cost, is one of the more affordable CDL trainings listed on INTraining. The hours of training will work well for Jeremy and he is excited about the job placement services the training offers and the training's accreditation with the Indiana Department of Revenue.

Academic and Career Counselors should facilitate problem solving and decision making throughout counseling sessions. They should share all relevant information and support customers in identifying the benefits and limitations of each training program being considered. The goal of all academic and career counseling sessions must be to ensure that all customers are making the most informed possible training choice. The training program must be the best and most appropriate action step towards their chosen career.

What are some things that could make a training choice a "bad fit" for a customer, even if the training is in their desired career plans?

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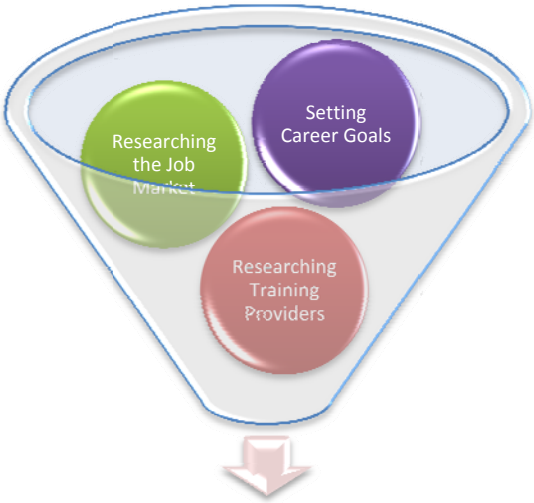
CHOOSING A TRAINING PROVIDER



Choosing the Right Provider

Step 1: Setting Career Goals

It is crucial that a customer chose the educational or training program that is the right fit for their individual needs and goals. Successful completion of training is crucial to entering the chosen career path. Using Strength-Based philosophy, Academic and Career Counselors must be able to coach, support and guide customers to make the best possible decisions on which training is most appropriate. It is important that an ACC never dictate to customers what training or provider they *should* attend. The ACC should be encouraging customers' self- exploration through counseling sessions, assessments and the development of a detailed Academic and Career Plan (ACP).

CASE STUDY

Christie is a 42 year-old WorkOne customer who is interested in training to further her career. She dropped out of high school in the 11th grade and had three children. She did obtain her GED when she was 28 and since then has worked various retail and customer service jobs. Recently, she worked for four years as a bank teller but was laid off when her branch merged with another. Christie really enjoyed her experience at the bank and is interested in getting back into the field, but would like to move out from behind the teller station into a different position.

It is effective to lead customers to research the possible educational choices fully. This will build customer confidence and empower customers. Through this process, customers will begin to see themselves as capable and able to make the informed decisions of what training programs to attend. They will also develop important problem solving and critical thinking skills that can be used in future situations.

> Christie meets with an ACC to discuss her career and training options in the financial industry. She is not exactly sure what job she'd like. She expresses interest in working for the accounting department, helping people open up new accounts or working in the loans department. Christie's ACC shows her the O*Net, INTraining and Indiana Career Explorer websites to allow her to do some career research.

It is important that customers have a clear long-term career goal before looking at training options. An Academic and Career Counselor must work closely with customers when developing the ACP. Customers must examine and articulate their motivations for pursuing a specific occupation and ensure that the career choice aligns appropriately with customers' values.

- Are customers attracted to the good salary or the work schedule a specific occupation offers?
- Are the working conditions ideal for the customer?
- Is job security particularly important to the customer?
- Is there room for promotions and professional growth?

The ACC should ensure that the customers have adequate information about the occupation, including what typical job duties are included and ensure that customers can envision themselves in this career path. Using the results of the assessments in Indiana Career Explorer is a good starting point for these discussions. ACCs must remember to ask open-ended high- gain questions whenever possible to obtain the most reliable information.

> Christie does some extensive research about career options in banking and finance. She learns that both "Accountant" and "Accounting Clerk, Bookkeeper" are on the Hoosier Hot 50 Jobs list as jobs in high demand. Using INTraining, she sees that "Loan Interviewers and Clerks" is also a job expected to grow significantly.
> Exploring the job duties each position would be responsible for, Christie decides that "Accountant" and "Bookkeeping" are the two jobs that best fit her interests, likes and skills. She likes math and has always had a keen eye for detail and she's already familiar with the banking industry. Christie also has strong computer and typing skills.
> Although the high salary that could come with a job as an Accountant is appealing, Christie is worried that she's "too old" to spend the time it would take to obtain the Bachelor's degree that would likely be necessary to get a good job in the field.
> According to INTraining, Christie wouldn't need a Bachelor's degree to get a job as a Bookkeeper, but could benefit from a training or certification to develop new skills and

increase her marketability. A bookkeeping job probably wouldn't pay as much as an accounting job, but it would be a substantial raise from the wage Christie was making as a Teller and the training and job descriptions feel like a more realistic and natural fit for Christie. She makes up her mind. She wants to pursue a career in Bookkeeping.

REFLECTION

What additional important factors may Christie consider in her career goal setting?

_____

_____

How is Christie empowered to reach her goals?

_____

_____

Based on what you know about Christie, do you feel this is an appropriate career goal for her? Why or why not? Is there additional occupational fields you feel may be appropriate for Christie to explore?

_____

_____

Step 2: Job Market Research

Before settling on an occupation, it is important for customers to do job market research. The Academic and Career Counselor is a resource for occupational information. It will also be empowering to guide the customer to complete career and job market research on their own. This will allow customers to experience first-hand what they can expect after completing a specific training. Hoosiers By The Numbers and ICC are some resources available online that provide valuable occupational information and can be used in job market research. Further information can also be found in the ACC Resource Binder.

Job Market research should include the following:

- Number of job listings for the particular job title or industry using local newspapers
- Number of job listings for the particular job title or industry online and using ICC, ICE and job posting websites
- Number of business in yellow pages that might offer this type of work
- Job location and accessibility
- Entry level wage
- What training, certification or experience is required to enter the specific field

Christie and her ACC meet to discuss her career goal. Her ACC commends Christie on the amount of time and effort she put into researching her job options. Her ACC suggests that before they begin to examine potential training providers, that Christie further explores bookkeeping job opportunities in the region.

Christie already looked to see what jobs in the finance field were in demand, but now that she has chosen bookkeeping as her desired position, she starts to look for openings in her area. She doesn't see much in the newspaper, but she finds several positions on the internet. She also has connections from the bank where she used to work and is trying to stay in touch with her former co-workers as they also try to find new jobs.

Christie finds that many bookkeeping jobs require strong proficiency in QuickBooks software and sees that entry level wages aren't much higher than what she was making as a Teller. This is discouraging at first, because most non-entry positions require at least two years of experience. However, Christie did receive several raises at her last job and believes that if she gets the right training, she could definitely earn raises in her new field.

An Academic and Career Counselor should discuss this job market information at length in the career development counseling sessions. It is crucial that customers have clear expectations of the career before making a decision about what training to pursue. It may be necessary for the Academic and Career Counselor to use constructive confrontation techniques if customers' expectations are unrealistic or seem unattainable.

REFLECTION

It seems like there are local opportunities for Christie if she qualifies herself for bookkeeping jobs through training. If those opportunities were not available, Christie's ACC would have had to use constructive confrontation to try to redirect her career goals. Generate a constructive confrontation approach to address a customer with career goals in a job that is not an in demand occupation.

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Step 3: Research Potential Training Providers

After clearly defining and articulating career goals, customers must make a decision which training program and provider offers the best opportunity to help them successfully progress toward reaching those goals. Researching all possible training programs can feel very overwhelming. It may be helpful

for ACCs to encourage customers to break this process into several manageable action steps. INTraining will give detailed information about approved training providers in an easy to use and understandable online format.

Some information that will be important to discuss with customers:

- Length of training
- Classroom schedule
- How many hours/week are spent in the classroom
- How many hours of studying are expected
- Cost of training
- Provider licensure and accreditation

> Christie and her ACC use INTraining to look at potential training options to prepare Christie for a career in bookkeeping. They agree that because Christie was recently laid off and is still supporting her two youngest children, they should look for training with minimal, if any, out of pocket costs. They also agree that a full-time training that lasts longer than a year will not be a good fit given her family and financial obligations. As a result of Christie's job research, she also wants to make sure that any training they consider includes lessons and/or certification in QuickBooks. A training that has all of that and also some kind of accreditation or offers job placement services would be the ideal training for Christie.

It may also be very helpful to customers, when considering and comparing potential training providers, to request school catalogs or additional printed material. This information may also be available online through the individual schools' website. Besides the basic information about what programs the school offers, ACCs and customers can use this material to experience firsthand the provider's general history and basic philosophy. It is important that the customer feels that the values implicit in the school's philosophy are in line with their own values. This literature will also have important information about the provider and programs licensing and accreditation.

Other helpful information included in school literature:

- Information about the program curriculum
  - Many of the best vocational schools will print what is included in their curriculum, including both courses and on-the-job training
  - Courses should generally start with basics, move on to specifics and then to hands-on training
- Information about the program facilities
  - This may include pictures or descriptions about classrooms, buildings, and equipment which are often a good indication of quality

    - The average class size to be sure that this matches with customer's learning needs. Smaller classes usually mean more individualized attention
- Information about the program instructors
    - It is important to examine whether they are licensed
    - Consider what kind of experience they have as instructors AND employees in the vocation they teach

It will be an important role for the ACC to guide the customer through each step of the administrative process. This process is sometimes overwhelming to adult students pursuing training. ACCs and customers should discuss training providers' admission policies. This includes when the training begins and what the application process is. It also may include tuition information. Some customers may need a lot of assistance with financial aid processes and some may need minimal assistance. A skilled ACC must be able to tailor their approach to each individual customer's needs. It will be always be important that customers fully understand what financially will be required of them in the form of fees and loan payments so they can properly prepare. More detailed information can be found in the Financial Literacy section of this manual.

Using INTraining, Christie and her ACC find several accessible trainings. Some would yield an Associate's degree, but take two years and cost over $30,000, so those are eliminated from contention. For the shorter, more affordable trainings, Christie and her ACC use the internet and the ACC's training binder to learn more about what the trainings have to provide and what they require.

After looking over course descriptions and curriculums, they agree on three programs that fit most of their criteria.

Christie's ACC also encourages Christie begin the financial aid process to determine what money Christie may have access to for training. Christie helped her oldest daughter with her financial aid applications when she went to college, so she feels confident doing her own, but asks her ACC to look them over before she submits them, just in case.

It will be important for ACCs to have a clear and concise way to assist a customer compare trainings that they find interesting. Using the Provider Comparison worksheet a customer can easily do a side by side comparison of training programs. Larger versions of this worksheet can be found in the Appendix.

Provider Name		
Program Name		
Program Availability		
Credential		
Length		
Placement		
Cost		
Financial Aid		
Personal Factors		
Other Factors and Considerations		

This will allow customers and ACCs to identify what factors are most important. Using the worksheet, customers can make a side-by-side comparison and further narrow the training programs that they are interested in investigating further.

After the intensive research, the ACC and customer should narrow the list of potential training providers to 3 schools offering the desired program that seem to be the best fit for the individual customer.

Step 4: Choosing the Right Training Provider.

After narrowing the long list of training programs to 3 potential providers that best meet customer expectations and needs, a customer should be encouraged to visit these schools. It is best to plan a day long visit while classes are in session. During the visit, the customer should speak with an admissions officer to clarify any information and ask questions about the training program. It will be important for a customer to investigate what percentage of students actually completes the program being considered. A customer can also inquire if the training results in an automatic certification or if a state testing is needed for the certification. This is also an opportunity to investigate what percentage of students passes the required exam. Speaking with an admissions representative will also allow a customer to find out about the training programs' job placement process and philosophy. It is

important to ensure that the training will be likely to result in the desired employment opportunities and allow customers to progress toward their ultimate career goals.

A site visit to the school may also provide an opportune time to speak with students that are currently enrolled in the program. Students' satisfaction can be an important factor in deciding what training program will be most likely to lead to success. Students are able to provide a first person account of their own experience and whether they consider the training to be worth the investment. A school may also provide the opportunity to speak with former graduates who can provide a reliable measure of the training programs' effectiveness. They may be able to share their current level of employment in the training's occupational field and whether the training helped prepare them adequately for their careers. They may also be able to provide valuable insight as to whether they consider the training valuable or if there is an alternate way of obtaining the skills needed to enter the career field.

It is important for a customer to experience the training atmosphere and facilities first hand to ensure that it is a place that they feel comfortable and is conducive to their individual learning needs. A customer can look at the buildings, classrooms and equipment used. It is important that these are up to date. It is important to investigate what practical and hands-on experience is offered through the training. Site visits will provide an opportunity to look at labs, shops and facilities to see if these accurately reflect experience that will be similar to real work situations.

ACCs and customers can work together to decide which training provider is the best fit for that individual. ACCs must have extensive knowledge of programs available. It is important that the individual customers' needs are properly assessed when providing guidance and professional opinions as to the most appropriate training program. ACCs must fully address all of the customers' current life circumstances, commitments, interests, strengths and goals in providing any training program recommendations. The goal is to facilitate research opportunities that will allow customers to gain as much information about the training programs and allow them to make the most informed choice possible

Christie ranks the three schools left on her narrowed-down list based on the information she and her ACC collected and sets up visits with each of them. The first school is great. The facilities are bright and clean and she gets the opportunity to sit in on a class in session. She likes the instructor's teaching style and can imagine herself doing very well in the class. The second school is not a great fit. The hours don't work as well for Christie and the students seem to all be in their early 20's. Christie worries that she'll feel out of place. The first training had a lot more professionals in the classroom. The third school is also great, almost as good as the first. She is not able to sit in on a class, but the Bookkeeping teacher is able to meet with her and discuss the curriculum with her in depth. The teacher also tells Christie about some of the graduates from his last class who have already obtained employment and shares their success stories.

As a result of her visits, Christie eliminates the second school from contention. She looks at the first and third school. The first school offers a six-week training for just over

$2,500. The second school's training is eight weeks long and costs closer to $3,000. Both offer industry recognized diplomas and prepare students to take the QuickBooks certification exam. The second training offers job placement services for graduating students, while the first one does not.

Based on her experience visiting the schools, Christie and her ACC weigh the plusses and minuses of each program. They agree that because of the personal attention she received from the teacher at the third school and the demonstrated job placement track record, the school would be worth the extra money and two weeks of training.

With her ACC's assistance, Christie begins the application process and is accepted to enroll in training with the third school.

Once customers have decided on chosen field or industry and the training an ACC should provide proper coaching and support. An ACC should be sure that customers understand no matter what training program they pursue, it may require them to make personal sacrifices. They may be required to be "up too early"," study too late" and have "too much to do." Customers must be aware of potential sacrifices they may have to make and have realistic expectations of the training program requirements in order to secure resources to be successful. ACCs facilitate these discussions and ensure customers feel a responsibility for their own success. The goal of the WorkOne Center is to assist customers to make the right training choice, to successfully complete the training and to progress on an occupational pathway in order to meet their career goals.

Christie contacts her ACC at the end of her first week of school. She is enjoying herself and is learning a lot. Christie finds that she is already familiar with many of the ideas and concepts being introduced. Her ACC congratulates her on a successful week of training, but tells her that the class is likely to get harder. Her ACC reminds Christie that the WorkOne center is still there for her and asks that she not hesitate to come in or contact them if she needs any assistance in finishing the training. As a next step, the ACC sets up a follow-up appointment for the end of the following week.

What else can Christie's ACC do to continue to support her throughout her training?

_____

_____

_____

_____

Financial Literacy

Competencies: Decision Making, Communication, Referral, Teaching, Assessment, Technology, Research and Evaluation

INTRODUCTION

Through the services provided at the WorkOne Centers, Academic and Career Counselors support customers in setting and achieving their career and educational goals. During this process, it is essential to identify barriers and to coach the customers to effectively uncover the resources necessary to resolve these barriers. One of the challenges customers often face is lack of financial assets.

It is necessary for ACCs to have information and resources to assist the customers overcome the financial burden associated with pursuing educational opportunities. Education and training ventures are often expensive. Financial strain can be a key factor for customers deciding if they are able pursue their educational steps necessary to achieve their long-term career goals. If a customer does not have the financial resources, an educational pursuit may not be attainable or realistic. It is important for an ACC to be knowledgeable of the different strategies and resources available to help customers fund education. An ACC may need to share information about budgeting and funding options available in academic and career counseling sessions.

BUDGETING

Before customers can plan for training or post-secondary schooling, they must fully explore their existing financial situation by drafting a budget. Once a thorough budget is in place, customers can begin to determine how much money they have available to contribute toward their desired educational or training program. In addition, customers will often need to consider other sources of funding.

For many people, regardless of the level of income, it feels like the amount of money is not enough to cover expenses. Financial strain is often a major source of stress for families. Creating a realistic budget and sticking to it can reduce the stress a family feels from limited funds and allow them to live within their financial means. Developing a budget is essential when one decides to pursue training. Budgeting allows individuals to track where money is spent and adjust their behaviors according to established financial goals. Budgets enable customers to feel control over their finances and gives them more control of their life circumstances. Financial stress may not be completely eliminated, but budgeting may make the additional costs associated with education less overwhelming. If ACCs can show customers the importance of establishing a budget, financial strain will become manageable.

Customers often have financial responsibilities beyond just themselves, which include dependants. The financial situation of the entire household should be considered when creating a realistic budget.

A financial decision or commitment made by one member of the household, will usually affect the entire family.

It is important for ACCs to work with customers to assess the full financial picture including, all resources, support systems, sources of income and expenses.

***Drafting a budget consists of four steps*:**

1. **Determine all current income sources, amounts and frequency**
2. **Determine all current expenses, amounts and frequency**
3. **Organize the information into columns to easily compare expected versus actual**
4. **Track all income and expenses to validate the budget and adjust the expected values as necessary**

The steps to creating and maintaining a budget are quite simple in theory, but most people struggle with implementing, monitoring and adjusting their budgets once they are established. This follow-up is critical to ensuring that the budget reflects the customer's financial reality.

The easiest way to create a budget is to use a template. With a form like the *Planning Your Budget* worksheet, customers are prompted to identify their expenses and income sources. Not all of the prompts will require values and each individual will likely have additional items to add to the list in the blank spaces provided. ACCs will need to tailor their approach to individual customers needs. Using the budgeting sheet, an ACC can help customers effectively assess current finances and plan for the future.

PLANNING YOUR BUDGET

To plan your budget, complete the Income and Expenses sections that follow, then carry-over the values from those sections to the appropriate spaces provided below to determine how well your budget is working. When recording your income and expenses, remember to be as thorough as possible!

MONTHLY BUDGET TOTAL	BUDGETED	ACTUAL
Total Spendable Income	$_____	$_____
Total Monthly Expenses	$_____	$_____
Budget Balance (Income - Expenses)	**$_____**	**$_____**

NOTE: A positive amount in the "Budgeted" field indicates a planned surplus of cash for the month. A negative amount indicates planned overspending and should be corrected immediately. If the "Actual" field is greater than the "Budgeted" field, the budget is working and extra money is available to be allocated to additional goals. If the "Actual" field is less than the "Budgeted" field, it indicates that overspending has occurred and the budget should be reevaluated as soon as possible.

INCOME

	BUDGETED		ACTUAL	
	Money Out	**Money In**	**Money Out**	**Money In**
NET SALARY EARNINGS				
Total Gross Salary earnings (before taxes and deductions)		$_____		$_____
Payroll deductions (taxes, health insurance, etc.)	$_____		$_____	
Contributions to savings, 401k, etc.	$_____		$_____	
OTHER INCOME SOURCES				
child/spousal support, predictable gifts, interest, etc.		$_____		$_____
Total Spendable Income Total Gross Earnings minus deductions and contributions, plus other income **(Carry to Monthly Budget Total Section!)**		**$_____**		**$_____**

EXPENSES

		BUDGETED		ACTUAL	
		Money Out	**Money In**	**Money Out**	**Money In**
ROOM & BOARD EXPENSES					
Rent or Mortgage		$_____		$_____	
Utilities:					
Electric		$_____		$_____	
Gas/Propane/Oil		$_____		$_____	
Water/Sewer		$_____		$_____	
Trash		$_____		$_____	
Phone		$_____		$_____	
Cable		$_____		$_____	
Other		$_____		$_____	
Home/Renter's Insurance	(monthly allocation)	$_____		$_____	
Home Repair/Maintenance	(monthly allocation)	$_____		$_____	
Homeowner's Association Fees		$_____		$_____	
Property Taxes	(monthly allocation)	$_____		$_____	
Groceries		$_____		$_____	
Toiletries/Household Necessities		$_____		$_____	
Total Room & Board Expenses		**$_____**		**$_____**	

Expenses are continued on the reverse of this page.

EXPENSES (continued)

TRANSPORTATION EXPENSES			
Vehicle Loan Payment		$_____	$_____
Insurance	(monthly allocation)	$_____	$_____
Registration/Inspections	(monthly allocation)	$_____	$_____
Maintenance	(monthly allocation)	$_____	$_____
Parking		$_____	$_____
Fuel		$_____	$_____
Public Transportation		$_____	$_____
Total Transportation Expenses		**$_____**	**$_____**
DEBTS			
Creditor #1: _____	Balance: _____	$_____	$_____
Creditor #2: _____	Balance: _____	$_____	$_____
Creditor #3: _____	Balance: _____	$_____	$_____
Creditor #4: _____	Balance: _____	$_____	$_____
Creditor #5: _____	Balance: _____	$_____	$_____
Creditor #6: _____	Balance: _____	$_____	$_____
Additional Debts: _____	Balance: _____	$_____	$_____
Total Debt Expenses		**$_____**	**$_____**
OTHER EXPENSES			
Additional Insurance	(monthly allocation)	$_____	$_____
Additional Taxes	(monthly allocation)	$_____	$_____
Charitible Contributions		$_____	$_____
Childcare		$_____	$_____
Clothing		$_____	$_____
Dining Out/Snacks		$_____	$_____
Entertainment		$_____	$_____
Gifts		$_____	$_____
Medical Bills, Copays, Medications		$_____	$_____
Membership Fees/Club Dues		$_____	$_____
Personal Grooming (haircuts, color and styling, grooming products)		$_____	$_____
Pet Supplies, Vet Bills		$_____	$_____
Religious (tithes, offerings, clothing, supplies)		$_____	$_____
School Tuition, Supplies, Uniforms	(monthly allocation)	$_____	$_____
Subscriptions (magazines, newspapers)	(monthly allocation)	$_____	$_____
Cash (unaccounted spending)		$_____	$_____
Other Miscellaneous Expenses		$_____	$_____
Total Other Expenses		**$_____**	**$_____**
MONTHLY EXPENSE TOTALS			
Total Room & Board Expenses	(from total above)	$_____	$_____
Total Transportation Expenses	(from total above)	$_____	$_____
Total Debt Expenses	(from total above)	$_____	$_____
Total Other Expenses	(from total above)	$_____	$_____
TOTAL MONTHLY EXPENSES (Carry to Monthly Budget Total Section!)		**$_____**	**$_____**

Effectively Using a Budgeting Worksheet

Income Sources

For most people creating a budget, the income section is an easy place to begin. The money coming into a household tends to be confined to a few sources, while the money flowing out tends to go in far more directions.

Any regular and predictable source of income should be considered as part of the budget, including:

- Wages
- Sales earnings
- Unemployment benefits
- Public assistance benefits
- Interest earnings
- Income from other sources such as rental property or boarding.
- Any income that is regularly contributed by a spouse, child, or other household member should also be considered

While most people occasionally receive money from such sources as gifts, winnings from games of chance, or tax returns, these should not be included in the budget unless the amount and timing are predictable. For example, if a relative gives $25 every year as a birthday gift, and one can reasonably expect that he/she will continue to do so, it can be recorded as an income source. If a person won the lottery last fall, this would not be included as income because it is not predictable.

The key is to only consider the items that are *predictable*. Any sporadic income is a bonus but cannot be relied upon to meet the financial needs of a household.

Expenses

Unlike income, expenses tend to be much more widespread making them difficult to track.

The old adage, "*Mind the pennies and the dollars take care of themselves*," is quite relevant to budgeting. The tiny purchases made daily may seem too small or insignificant to track, but when lumped together, they can actually add up to significant amounts. For example, it may not seem like much to spend $5 for a coffee drink on the way to work each morning, but that $5 adds up to $25 per week (given a five-day work week) and $1300 per year. If an individual was interested in increasing their savings they could simply begin brewing coffee at home.

Without a thorough budget, this seemingly tiny expense would go overlooked. By considering all expenses as part of the family budget, customers can identify significant amounts of money that can be saved by small behavioral changes.

A budget is generally set up to record month-to-month expenses, with a summary at the end of the year. Sometimes individuals have expenses that are not paid on a monthly basis. These tend to be the payments which cause people the most stress because they seem to come unexpectedly and pull funds from an already empty pocket. To avoid this sort of situation, a person can plan to set aside a portion of the money for these expenses each month. When these payments are due, there will already be money set aside to pay them. For example, if car insurance is $1200 payable each December, it may cause panic because there never seems to be enough money at the holidays. To avoid this problem, it is possible to allot $100 each month towards that bill, so that there will be sufficient money saved and available to pay it in December. The other key is to not overspend on the holidays. Modifying behavior to reduce stress created by finances should be a key goal when counseling customers in effective budgeting.

When helping a customer to consider expenses, be sure to include the following:

- Housing (mortgage/rent)
- Utilities
- Child care
- Credit card debt payments
- Groceries
- Entertainment and dining
- Vehicle payments, fuel and insurance

It is important to consider the less obvious expenses as well:

- Habits/Lifestyle (coffee shop, smoking, happy hour)
- Child support, spousal support (*paid* by customer)
- Existing student loan payments
- Vehicle repairs and registration
- Additional insurance premiums
- Medical expenses, including co-pays and medications
- Contributions to savings, 401k, and health savings plans
- Charitable donations
- Religious expenses (church tithing, offerings, clothing and supplies)
- Clothing (for each family member)
- Gifts
- Educational expenses of the entire family including children (uniforms, supplies, books, fieldtrips, sports)
- Avoidable fees bank fees, late fees, overdraft fees, ATM fees, money order costs
- Pet expenses
- Hobbies

The *Planning Your Budget* worksheet guides customers through the most common expenses, but is not all-inclusive. As an ACC, it is your job to help customers to identify as many expenses as possible to gain the most accurate picture of their finances before considering an educational program. ACCs can do this by asking high-gain, open-ended questions during counseling sessions.

Making The Budget Work

As can be seen in the *Monthly Budget Total* section of the *Planning Your Budget* worksheet, a positive amount in the "Budgeted" field indicates a planned surplus of cash for the month. A negative amount indicates planned overspending and should be corrected immediately. If the "Actual" field is greater than the "Budgeted" field, the budget is working and extra money is available to be allocated toward other purposes. If the "Actual" field is less than the "Budgeted" field, it indicates that overspending has occurred and the budget should be reevaluated as soon as possible. Once the customers can establish a budget, as accurately as possible, the ACC can then help them to assess their educational goals and the financial feasibility of achieving them. If customers do not have the means for education, based on the budget provided, further steps need to be taken to find additional resources.

Once customers have income and expenses recorded as accurately as possible on the *Planning Your Budget* worksheet, they should compile the totals to the top of the front to determine their budget balance. If income is less than expenses (a negative budget balance), there will need to be a plan to make adjustments to spending. For example, a customer may decide to pack lunches or cancel premium cable.

This sort of planning is critical before customers can financially plan for an educational program. If the budget balance is already negative or close to breaking even, there may be a need to make changes to current spending habits to ensure that customers can afford the educational costs. Remember, that all additional expenses related to education haven't been considered yet, it is imperative that customers have some room for allowances in their family budget before taking on the financial burden of an educational program.

Having a sound budget in place is a great start, but it will be advantageous to monitor this for a few months to ensure that the actual spending and income match the budgeted amounts. Every budget should be routinely revised to accommodate changing financial needs. For example, every parent knows the ever-rising cost of children's shoes. A customer may have budgeted $100 for shoes for a child for the year, but suddenly finds the child outgrowing or wearing through shoes much faster than expected, costing $100 every two months. While this may seem like a drop in the expense bucket, it is necessary to revisit the budget to ease this new expense into the plan to avoid creating a negative balance by overspending.

ACTIVITY

In order to fully understand the process your customers will follow, plan your own household budget using the *Planning Your Budget* worksheet.

REFLECTION

What did you find most difficult about planning your budget? Were you surprised by the results?

_____

_____

_____

_____

How can you effectively use the budgeting worksheet with customers? How can using the budgeting worksheet empower customers?

_____

_____

_____

_____

_____

_____

MAKING INFORMED EDUCATIONAL DECISIONS

Once customers have a working family budget, an ACC can begin to guide the process of selecting appropriate educational providers.

The choice of provider will be based on several factors:

- Availability of training/degree/certificate desired
- Documented quality of education provided
- Job placement rate for graduates of program
- Cost of program
- Amount and types of financial aid available
- Customer's ability to meet entrance requirements for desired program and provider
- Personal factors (such as distance from customer's home, time commitments required to complete program, layout of facilities, feeling of "fitting in" for customer, etc.)

All of these factors will influence a customer's decision, although each to a different degree for different customers.

When ACCs are counseling customers on selecting training programs, they will find that there is no one-size-fits-all discussion. However, ACCs should ensure that every customer is starting with a sound foundation by choosing a program of study that will lead to the career identified in the goal setting

process. This occupation should be in-demand and a realistic goal for the individual customer. Customers should not pursue an educational program that may fail to result in a career.

ACCs may also encourage customers to research their desired career in order to determine the most appropriate educational path needed to enter that field. It is also important to make sure that customers' training choices are a good match for their prior experience, learning style, education, values, life circumstances and skills.

More in depth information about choosing appropriate training and education opportunities can be found in the Training Section of this manual

Once customers are certain of the type of training needed, ACCs should provide resources to help find providers of that training. The best source for training information in Indiana is the INTraining site (https://solutions.dwd.in.gov/INTraining/search_criteria_home.htm). Customers can compile a list of potential providers and begin to evaluate them. More detailed information about INTraining is included in the Training Section of this manual.

Customers directed to the INTraining website and should be encouraged to consider cost along with other factors when choosing the best training fit for their educational needs. Of course, from a financial perspective, customers should look to select the highest quality training that is offered at the lowest cost. While cost is an important, the quality of the program should never be overlooked when deciding on an appropriate provider. Customers should always consider the quality and the job placement rate first. Counseling should be provided on the amount of debt taken on from a particular program, including the cost of loans. If all things are equal, when comparing programs, the lowest cost provider should be encouraged. A significant portion of the ACC's work is in assisting customers to make the right decision about training, with cost being a relevant factor to the decision.

ACTIVITY

Identify three providers for Automotive Technology in your region. Compare these programs as if you were the customer choosing which to attend.

Provider Name			
Program Availability			
Quality			
Placement			
Cost			
Financial Aid			
Personal Factors			
Other Factors			

What criteria would you value more? Why? What other factors must be taken into consideration when researching training options?

_____

_____

_____

_____

_____

_____

Which program of the three would you choose? Why?

_____

_____

_____

_____

_____

_____

_____

Repeat the process for Certified Medical Assistant programs in your area. Again, compare these programs as if you were the customer choosing which to attend.

Provider Name			
Program Availability			
Quality			
Placement			
Cost			
Financial Aid			
Personal Factors			
Other Factors			

What criteria would you value more? Why?

_____
_____
_____
_____
_____
_____
_____

Which program of the three would you choose? Why?

_____
_____
_____
_____
_____
_____

REFLECTION

Which factors in the provider selection process are the most difficult to research, understand or consider? Why?

_____
_____
_____
_____
_____

What can you do to help your customers navigate these factors with confidence?

_____
_____
_____
_____
_____

Apart from INTraining, what other resources can you recommend or provide to your customers that may help them when selecting an educational provider?

_____

_____

_____

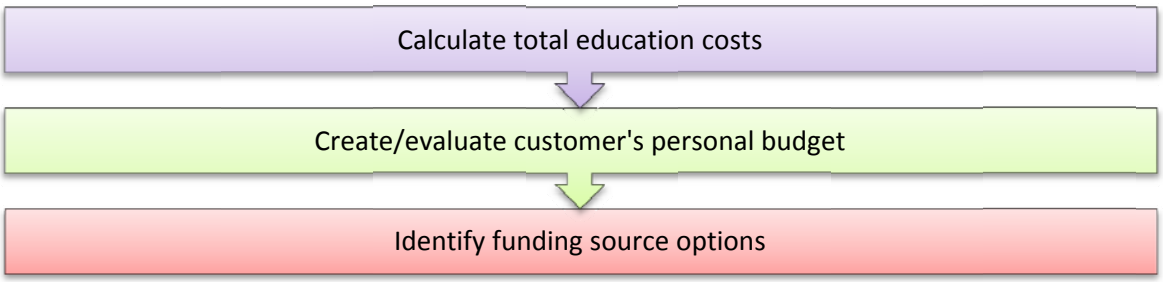
_____

_____

BUDGETING FOR EDUCATION

Having a sound family budget is the essential to planning for an education, but there is much more to consider. ACCs should counsel customers to proactively create a budget that *includes* the costs associated with their chosen educational program.

Important steps to creating a budget for education:



For each customer, the costs of education will be very different and likely depend on many factors.

These factors may include:

- Tuition and fees for the chosen program
- Amount and type of financial aid (if any) available to the customer
- Books and supplies (including professional tools for many trade programs)
- Secondary costs for family (additional childcare, transportation, etc.)

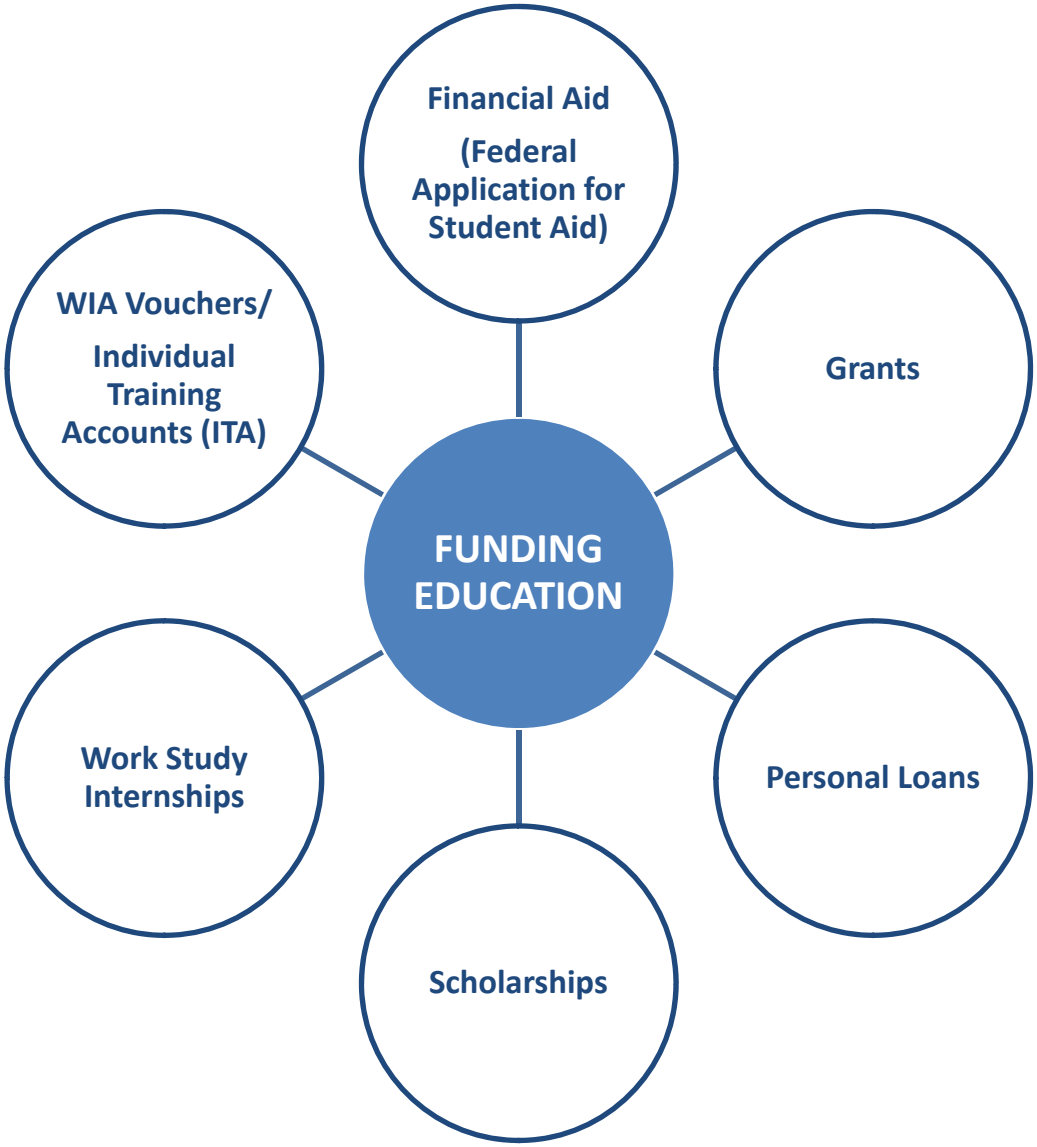
Customers should consider how their current budget will change when they begin training and should plan accordingly. This may include exploring potential changes to the sources, amounts and frequency of income, as well as additional expenses. The budget should be explored for the entire length of the training program. It is important for the ACC to continually coach customers during financial planning sessions to ensure the budget is realistic.

In order to determine each of these costs and draft a comprehensive budget for education, customers will need to first determine where they will pursue education and apply for financial aid. An ACC should

fully understand the process of choosing an educational program, as well as navigating the world of financial aid to effectively support customers through this process. Customers should be encouraged to make the wisest financial decisions possible when pursuing educational goals.

FUNDING SOURCES

It is important for Academic and Career Counselors to be well-versed in the various funding options available to customers to assist with paying for training. ACCs should coach customers through exploring financial aid options and developing a realistic plan to subsidize their education.



Financial Aid

Financial aid is the term used for all sources of funding that help a student cover the costs of an educational program. Funding sources include very different types of awards, but they all governed by strict rules for use and repayment.

ACCs should be creative when researching possible educational funding options for customers. They should research all options that may be applicable and available to customers. Throughout the process ACCs should continue to use Strength-Based and empowering approaches to establish rapport and build customers' problem solving skills. It may also be helpful for ACCs to establish relationships with financial aid counselors who have more extensive knowledge about what scholarships and funding options are available to customers.

Free Application For Student Aid

The first step to obtaining funding for an educational program is to complete a Free Application for Federal Student Aid (FAFSA) at http://www.fafsa.ed.gov/. (ACCs should be aware and advise customers to avoid the many .com sites which will charge a fee to submit the FAFSA.)

The FAFSA helps to determine a potential student's eligibility for financial aid and allows various federal, state and school entities to make appropriate financial aid offers. This provides a bridge between family or personal contributions and the educational program cost. Most two and four-year colleges and universities, as well as career schools rely, on the FAFSA for awarding federal, state and college student financial aid. Anyone that is entering a 2 or 4-year public or private educational institution, a career school or a trade school should be able to apply for financial aid using FAFSA. Youth customers at the WorkOne center should complete the FASFA regardless of initial training. When possible while working with youth customers, the FASFA completion should be a joint exercise with the student and parent.

FAFSA forms are typically completed online and include a series of questions about a student's financial, family, and educational situation. There are very strict deadlines for submission of the form, so it is critical that customers are timely in their submission. The deadline in Indiana is March 1 for state aid. The earlier a customer completes and submits the application the more aid they are likely to receive if they are eligible. All forms are available January 1. To file a FAFSA, the customer will need to have requested a Personal Identification Number (PIN) from www.pin.ed.gov. This can either be displayed immediately on the computer during the application process or can be sent through email or mail, both of which involve some delay and should be planned for accordingly.

Before logging in to complete the FAFSA online, customers should be encouraged to print a practice form and gather their information. This will save a significant amount of time in the online application, which is especially important if the customer must rely on a public computer with limited access times. The FAFSA does ask customers to enter their social security number, as well as other pieces of very personal information. It should be noted to the customer that if he/she uses a public computer to

process a FAFSA, the internet should be closed completely and the computer's history cleared upon completion of the customer's session to prevent other users from accessing any personal information.

In addition to the FAFSA form, the US Department of Education (http://studentaid.ed.gov/PORTALSWebApp/students/english/index.jsp) provides numerous other free resources for anyone considering an educational program. Customers should be advised to explore this site and educate themselves before committing to any type of training program and especially before accepting any financial aid.

Additional information about completing the Federal Application for Student Financial Aid can be found in the Appendix Section of this manual.

REFLECTION

Explore the FAFSA worksheet included in the Appendix section. Are there any areas that you anticipate will be difficult of confusing for your customers? What strategies can you use to make this process less overwhelming for customers?

_____

_____

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_____

_____

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_____

Grants

The best kind of student funding are grants. Grants, whether federal, state, school, or private, are essentially free money that does not need to be paid back. That does not mean that the money is given without specific requirements or stipulations. As with any type of financial aid, there will always be very strict policies that govern the distribution, use and repayment of student grants. For example, if a student receives a federal grant for tuition, then drops out a week into the first semester, that student will likely have to pay back the grant money. Some grants come with specific tags for what the money can be used to cover (tuition, books, lab fees, housing, etc.) but the money is always given with the intent that the student will not need to pay the money issued or interest back to the grantor.

Most grants have simple expectations of students: maintain a specified number of credit hours (for either full or part-time status) and remain in good academic standing. For the most part, grants are the easiest and most desirable type of funding.

Common grants received by students who complete a FAFSA include:

- Federal PELL Grant
- Federal Supplementary Educational Opportunity Grant (FSEOG)
- Teacher Education Assistance for College and Higher Education (TEACH) Grant
- Iraq and Afghanistan Service Grant

Grants are typically awarded to applicants with financial need as determined by their FAFSA. To fully understand the requirements for each grant, customers should be directed to the US Department of Education website or to the financial aid officer for the provider they have selected.

Scholarships

Scholarships are similar to grants in that they do not need to be paid back. One of the key differences between grants and scholarships is that a scholarship often requires the applicant to meet specific criteria in order to be eligible for consideration. Many scholarships also require some additional achievement by the student. Unlike grants, scholarships are almost always competitive and applicants must present some form of evidence to demonstrate that they meet the scholarship criteria more than any other applicant. Scholarships are typically privately-funded, based on some shared value, interest, or trait rather than financial need, and the majority are not awarded through the FAFSA. The individuals or foundations who establish a scholarship determine the criteria to be considered for applicants.

The sets of criteria include:

- Merit – students must demonstrate specific academic, athletic, artistic or other achievement
- Career – only applicants pursuing specific career goals will be considered
- Trait – only applicants who meet specific trait requirements will be considered
- Membership – only members or affiliates of the founding association are eligible
- Need – applicants must demonstrate financial need, often through completion of the FAFSA

Merit scholarships are by far the most widely known. Everyone has heard of the star football player who "got a free ride on a football scholarship", meaning that his tuition, fees, books, housing and other expenses were paid because his athletic achievement met the requirements of the scholarship more than any other applicant.

Career scholarships encourage students to pursue training in a specific career or branch of research. For example, an RN returning to school for doctoral studies in cancer nursing may be awarded a American Cancer Society Doctoral Scholarship in Cancer Nursing for a yearly stipend, tuition, room and board.

Trait scholarships are by far the most varied. Minority scholarships are probably the most common, but this category can include criteria such as:

- Race
- Ethnicity
- Gender
- Family history
- Personal interests and hobbies
- Medical history
- Physical appearance
- Religion

Customers should be cautioned that, while there are many trait scholarships to be had, there are just as many scams and frauds. There are a very large number of scams that prey on students looking for aid, and those responsible will not hesitate to use the customer's personal information for their own gain. Customers looking for financial aid should thoroughly research each potential source of funding and only apply for scholarships that have been confirmed as safe. When in doubt, customers should be coached to not apply to questionable organizations. Customers should also be cautioned about providing personal information to any solicitors, which may be very common once the customer provides an email address for any application.

Membership scholarships usually require at least participation or family association with the hosting organization. However, many also provide additional requirements based on the individual goals of the organization. For example, the National Rifle Association sponsors several different scholarships for their junior members and for children of law enforcement officers who are NRA members.

Need-based scholarships generally require the FAFSA, if not for the direct determination of award, then for financial justification of the applicant's need. Federal need-based scholarships are sponsored by federal organizations such as the US Department of Health and Human Services, National Oceanographic and Atmospheric Administration and US Department of Transportation. Many of these scholarships are directly tied to fields of study related to the sponsoring agency and many require the student to complete a specific internship or fellowship in return the for funding. Private need-based scholarships can either be based solely on need or can overlap with any of the other scholarship types, requiring any combination of traits, merit, career or affiliations.

Work-Study

The Federal Work-Study (FWS) Program is governed by the student's financial need as determined by the FAFSA, and allocated as a lump sum to be earned as wages through employment with the student's school or another organization as arranged through the student's school. Since the FWS is offered as a by-term lump sum, the student must work the appropriate number of hours (generally at the federal minimum wage) to earn that sum over the course of a school term. Once the money has been exhausted

for the given term, the student is unable to earn more. Work-study is earned through hourly employment; therefore, it does not need to be paid back.

Typically, students are employed through their major department and their employment is directly tied to their program of study. In this way, the school is able to plan and monitor the student's use of hours and wages as well as the student's academic and work progress. Many students view work-study as an opportunity to build their career resumes through work such as teaching or research assistantships with their major advisor which is directly applicable to their program of study and future career.

Loans

Student loans, unlike grants, scholarships and work-study, are money that must be paid back. The conditions for repayment vary depending on the type of loan, but most allow a brief grace period after the student has left school (or dropped below half-time status) before repayment commences. While there are various loan programs available to our customers, depending on their financial need, most fall into two major categories: subsidized and unsubsidized.

Subsidized loans are offered to students with financial need as determined by their FAFSA, and come with the benefit of having the interest paid by the US Department of Education during specific periods of repayment. For example, a borrower who has a Subsidized Direct Stafford Loan is eligible to have his/her interest paid by the federal government if he/she maintains at least half-time status in school. A borrower who has left school and entered into repayment will be billed the interest.

Unsubsidized loans are distributed without financial need requirements, but do not provide assistance with paying interest. This is the least desirable path to funding an education, as it typically costs much more than the original loan due to the accrual of interest over the years of repayment.

ACCs should always warn customers about the danger of taking on student loan debt (whether subsidized or unsubsidized). Loan debt is usually repaid over 20-30 years and cannot be ignored or cancelled for many reasons. Student loan debt is not easily erasable even if the borrower declares bankruptcy, so customers should be extremely cautious to only take on as much loan debt as they absolutely must and only what their chosen careers are likely to allow them to repay. If a borrower is not likely to find employment to earn enough to repay a loan according to the loan agreement, he/she should reconsider his/her educational finance plan.

ACCs should be sure to carefully counsel customers who are pursuing loans to fund training:

- Look for less expensive providers who may be able to provide some or all of the necessary training
- Apply for additional scholarships
- Gain employment with a company who offers tuition reimbursement for the desired training program
- Review the family budget to cut costs so customer can pay more out of pocket and borrow less during school

Individual Training Accounts (ITA) and Wagner Peyser Funds

In addition to the above financial aid choices, a customer at WorkOne Centers may be eligible for additional funds through an Indiana Department of Workforce Development (IDWD) WIA funds program. Individual Training Accounts (ITA) are the primary supports WorkOne can use to offer customers to help with the financial burden of furthering education and training. This is a grant program made available under the Workforce Investment Act of 1998, which compensates the approved provider organizations for adult education and training services provided to eligible adult and youth participants. The amount of funds available are proposed by each region and approved by DWD. A comprehensive list of approved training providers and programs can be found using INTraining.

Customers can use these funds for the purposes of Adult Education and training. The funds approved are for the purposes of covering the tuition costs, as well as any supportive services included in the cost of the program.

Each customer must go through an approval process to determine eligibility for such funds. Customers are required to take and pass a drug test. They must also submit for financial aid (FAFSA form) prior to the approval process. The customer must utilize any Pell Grants offered before the use of WIA funding. There is a maximum of $4,500 per year that can be paid to each ITA, to cover the tuition costs. This maximum ITA amount may vary slightly between regions. ACCs must have up-to-date information to share with customers concerning the ITA policy in their region.

All financial responsibilities that the customer will incur from such training programs should be discussed in academic and career counseling sessions. These financial responsibilities include the costs of any loans, plus interest that needs to be repaid. The customer should be aware of this prior to committing to the educational pursuit, so they can plan and budget accordingly.

It is important however that ACCs are not just reviewing customer's budget for education, but also customer's initial assessment inventories, life circumstances and goals to ensure that the training is in a field the customer is likely to find employment success.

ACTIVITY

Explore *Funding Education Beyond High School: The Guide to Federal Student Aid 2011-2012* by the US Department of Education.
(http://studentaid.ed.gov/students/attachments/siteresources/Funding_Education_Beyond_HS_2011-12.pdf)

What additional insights do you now have that you can use to help guide your customers in their pursuit of education?

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PROVIDING FINANCIAL GUIDANCE

It is the ACC's responsibility to help customers find the best educational experience at the lowest possible cost. This balancing act will rely on an ACC's ability to investigate appropriate resources, analyze and compare training program data and provide expert opinions, while coaching customers during academic and career counseling sessions. An ACC must support customers to identify appropriate financial resources. Throughout this process, customers must be very honest in critically evaluating their own financial, academic and employment situations. Working together, the ACC and the customer can develop a realistic and achievable plan for success.

In order to assist the customer get the most education for the least amount of dollars is challenging, but there are many ways to save money being a student.

Lowest Cost Schools

Not every school is created equal, but the price tag doesn't necessarily indicate which program is of a higher quality. Customers should review all available sources of information when rating the quality of education available at various schools. They are then able to make an informed choice of which training opportunity is the "right fit". INTraining gives a great deal of information about each provider, but should not be the only resource customers consult. ACCs should encourage customers to visit potential providers to talk to faculty, staff and students about their chosen program of study.

In many cases education is, to a large degree, what the student makes it. A student at a small state-run public school can gain an outstanding education, while a student at an Ivy League school may miss out simply by not taking advantage of all the program has to offer.

Community College

Community colleges offer many of the same certificate and associate degree programs available at major campuses, without the cost and hassle of attending the main campus. While it is not typical to find four-year programs at community colleges, many students save money by attending a community college for the first two years of their four-year programs, transferring to the main campus for their final

coursework and graduation. ACCs should encourage customers to explore this option by discussing benefits and requirements with the school's admissions office and main campus department of study before committing to any program.

Tax breaks

While it only provides perks once a year, tax time is a great way to save some educational dollars. There are three tax breaks currently available for students filing federal taxes:

- Hope Credit – available during first two years of college
- American Opportunity Credit – available during first four years of college
- Lifetime Learning Credit – available to a broad spectrum of students, including those in many professional and job-related courses

These credits are the main tax breaks, though there are additional incentives that may be available for certain customers. Additional information on these credits and other tax breaks can be found on the IRS website (www.irs.gov). Tax laws and credits change constantly, so customers should be referred to the IRS publications for the appropriate tax year or advised to talk to a qualified tax advisor if they need further tax assistance.

Lower Interest and Consolidation Loans

Customers who are considering taking on student loan debt should investigate their options to find the lowest loan rate available, if their school allows them to do so. The financial aid officer for the training provider should be able to assist the customer in all aspects of student borrowing and paying for school. Customers who have existing student loans and are considering additional schooling should consider shopping for a consolidation loan if their original loan rates were high. Student loan rates fluctuate, so borrowers should watch the interest rate trends for the lowest possible rate before consolidating. Through loan consolidation, borrowers can combine many loans, often at much higher rates, into a single lower rate loan with a single monthly payment. This can greatly help when budgeting for further schooling. ACCs should caution customers considering consolidation that, depending on the terms of the new loan, subsidized loans may be changed to unsubsidized and grace periods and deferment options may be lost. Customers should be sure they completely understand the repayment terms before accepting a consolidation package. ACCs may want to encourage customers to consult a qualified financial advisor before signing any official documents.

AmeriCorp and Other Community Service

Probably the best known community service funding source is AmeriCorp, though other organizations provide similar financial benefits. By volunteering with certain community-focused organizations, students may be eligible to receive tuition assistance through AmeriCorp or other organizations.

Customers should investigate possible funding for community service efforts at http://www.americorps.gov/.

Employer-Paid Education (Tuition Reimbursement)

Many employers offer tuition reimbursement as a benefit of full-time employment. Customers should always be encouraged to find employment as a first option, especially if the employment can be used as a stepping stone in the customer's desired career. Many employers will provide reimbursement of a portion or all of the tuition costs (generally based on final grade) if an employee is pursuing education relevant to the employer's mission statement. For example, if customer who works for a hospital as a janitor may be able to get tuition reimbursement for nursing classes, if he/she takes the classes while he/she is a full-time employee and receives acceptable marks in the courses. Customers should be encouraged to either check with an existing employer or to find work with a new employer who offers tuition assistance. In addition to gaining the direct financial help with schooling, working during school provides additional income and helps to build the customer's professional resume. It may even open opportunities for future employment positions with the employer once the customer completes training.

Military Education

For those customers interested, the various branches of the US Armed Forces offer many educational opportunities, with the obvious reciprocal commitments. Customers who have previously served may also have access to several additional financial benefits, including :

- GI Bill which provides educational benefits for veterans and their dependants
- Forgiveness of interest on many loans while on active duty
- Preference on certain applications, such as many scholarships

Veterans should consult their US Department of Veterans Affairs representative for assistance and information about available education benefits.

SCENARIO

June Smith is a mother of six young children who has worked at numerous retail jobs and wants to go return to school to become a nurse. She has worked hard over the past four years to earn her GED and while she only earned the minimum scores, she still managed to pass the test. Now that she has achieved this milestone in her life, she is anxious to go on further. Consider her educational and employment background and make recommendations for the next-steps. Suggest any resources through WorkOne and personal that would best help her reach her career goal.

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FINANCIAL PLAN AND THE ACADEMIC AND CAREER PLAN

After customers and ACCs work together to identify appropriate training and funding options, customers will make an informed decision of what training or educational opportunity they would like to pursue. This decision must be documented on the Academic and Career Plan. All financial information must be accurately reflected in the "Financial Plan" section of the ACP.

SECTION V: Financial Plan

Educational Grants
ITA Issued: ☒
Begin Date: mm/dd/yyyy
End Date: mm/dd/yyyy
Amount: 0.00
Demand Occupation (O*NET-SOC):

Pell Grant Issued: ☐
Begin Date: mm/dd/yyyy
End Date: mm/dd/yyyy
Amount: 0.00

Other Grants/Scholarships: ☐
Begin Date: mm/dd/yyyy
End Date: mm/dd/yyyy
Amount: 0.00

Customer Contribution: 0.00

Total Funds Available: 0.00
Program Cost: 0.00
Balance of Funds Less Program Cost: 0.00

For more detailed information concerning the ACP, please see the complete Sample and ACP Guide located in the Appendix Section.

Financial planning is an essential component of career and educational goal setting. ACCs and customers must thoroughly explore all resources and funding options available. They must ensure that the customer's chosen training is the best possible fit to ensure the customer's long lasting success. The ultimate goal of any training should be an occupation or career. It is important that customers are well informed of all financial expectations before taking on the additional financial burden of training. Training must be seen as an investment by the customer. The investment is often more than merely financial, the training will require the customer to invest their time, effort and resources to be successful.